AIB Advisors Insurance Brokers

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# Product Proposal/Illustration Request Form (Fax to 518.371.6131)

**Life**: Face Amount_____ Term____ Yrs.? Trad. UL____ Guar. No Lapse UL____ IUL____WL____
Waiver? Y/N Level/Increasing Death Benefit? _____ Riders?_____
Solve for Value?_____ 1035 Exchange? Y/N If Y, amount? _____LTC/Chronic Rider? Y/N

**LTCI**: Partnership: Y/N - Daily/Mo. Benefit_____ Benefit Period:___ Yrs. - Elim. Period 30-90 Days
Inflation %, if Desired_____ or GPO?_____Home Care %_____Riders_____

**Linked Life/Annuity** (circle): Single/Annual Premium Amount_____ 1035 Exchange? Y/N
LTC Daily/Monthly Benefit Desired_____No. Of Years_____ Inflation? Y/N

**DI**: Occupation_____Specific Duties_____
Own Business? If so, Classification – Sole Prop_____ S-Corp._____ LLC _____ C-Corp _____
Mon./Ann. Income (after expenses)? $_____ Monthly DI Benefit Desired $_____(or Max)
Waiting Period – 60-90-120-180-365-730- _____days Benefit period – 2yrs.-5 yrs.-to Age 65-to Age 67_____
Disability Coverage (Individual or Group) Inforce? Details_____

**Annuity**: Immediate-SPIA/Deferred (circle) - Desposit Amount? _____ Tax Qualified?_____
Deferred: Traditional/Indexed (circle) SPIA: Income Desired? _____ Mode: Monthly/Annually (circle)
SPIA: Life Only Y/N-Period Certain (# years)_____ Installment Refund Y/N – Survivor Bene.%-100/66/50

**Other Product/Rider Requests**:

| | |
|---|---|
| Producer Name: | Phone: |
| Fax: | Email: |
| State of Application: | Firm Affiliation: |
| Client Name: M/F | Spouse/Partner Name: M/F |
| D.O.B. or Age: | D.O.B. or Age: |
| Tobacco Use (last 24 Months): Y/N | Tobacco Use (last 24 Months): Y/N |
| Prescriptions (Dosage/Frequency)? | Prescriptions (Dosage/Frequency)? |
| Health Conditions? | Health Conditions? |

***Need Help? 800.695.8224:***
***Life–Option 3***
***LTC–Option 2; Linked/Life - x100/126***
***Linked/Annuity – x109***
***DI – x132***

**Our Policy is Taking Care of You**

Long-Term Care | Life | Disability | Annuities | Medicare | Benefits

*Affiliate Company of*

NATIONAL LONG-TERM CARE BROKERS, LTD. NEW YORK