

Request For Inforce Illustration

To Whom It May Concern:

I hereby grant _____ access to any and all information from your company pertaining to me or any of my policies.

Please forward a current status (cash values, loans, etc) and an inforce ledger on the below referenced insurance policies. The inforce ledger should be run as follows:

Type of Inforce Illustration Requested
(check all that apply)

- Full Pay – Pay scheduled premium all years
- Limited Pay – Scheduled premium payments stop when values adequate to endow policy
- Solve for Level premium to endow policy
- Please also provide current Account Value, current Surrender Value and Beneficiary Information
- Other

Hypothetical Interest Rate

Current & Guaranteed

Hypothetical Rate of Return (not to exceed 12%)

0% (required) 6%

8% Other _____

I authorize you to forward this information via fax to:

To:
(Current Insurance Company)

Policy Numbers:

Client:

DOB:

Policy Owner(s) Signature: _____

Date:

Date: