



# Life Insurance Illustration Request Template

Plan Name: \_\_\_\_\_

Client Name: \_\_\_\_\_

Sex:  Male  Female  Unisex

DOB/Age: \_\_\_\_\_

Risk Class: \_\_\_\_\_

State of Issue: \_\_\_\_\_

Death Benefit Amount: \_\_\_\_\_

Premium Amount: \_\_\_\_\_

Premium Stop Age/Year: \_\_\_\_\_

Payment Mode: \_\_\_\_\_

Index Strategy Allocation (Allocation must equal 100%)

MLSB: \_\_\_\_\_

PIMCO: \_\_\_\_\_

S&P 500 High Bonus: \_\_\_\_\_

S&P 500 High Cap: \_\_\_\_\_

Disbursement Age: \_\_\_\_\_

Death Benefit Option:  Increasing  Level

Death Benefit Option Switch Age: \_\_\_\_\_

## Additional Term Policies

(Add Death Benefit and Duration)

Term 1: \_\_\_\_\_

Term 2: \_\_\_\_\_

Term 3: \_\_\_\_\_

Term 4: \_\_\_\_\_

## Riders:

AAS Rider:  2%  4%  IRS Max

Death Benefit %: \_\_\_\_\_

Waiver of Monthly Deduction:  Y  N

Waiver of Specified Premium:  Y  N

Accidental DB: Y/N

ADB units (25-250): \_\_\_\_\_

Child Insurance Benefit:  Y  N

# of Units (1-25) \_\_\_\_\_

Select Income Rider:  Y  N

% of DB to Spread (10-100): \_\_\_\_\_

# of Installments:  10  20  30

Policy Design Notes/Goal/Agent information:

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