

Client Name:

POLICY REVIEW

Is this their only policy with you?

Policy 1

Company		Policy #	
Effective Date		Draft Day	
Face Amount		Premium	
Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)
Loan Balance	Interest Rate		
Reduced Paid Up			
Beneficiaries			
NOTES			

Policy 2

Company		Policy #	
Effective Date		Draft Day	
Face Amount		Premium	
Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)
Loan Balance	Interest Rate		
Reduced Paid Up			
Beneficiaries			
NOTES			

Policy 3

Company		Policy #	
Effective Date		Draft Day	
Face Amount		Premium	
Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)
Loan Balance	Interest Rate		
Reduced Paid Up			
Beneficiaries			
NOTES			

Policy 4

Company		Policy #	
Effective Date		Draft Day	
Face Amount		Premium	
Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)
Loan Balance	Interest Rate		
Reduced Paid Up			
Beneficiaries			
NOTES			

For Universal Life

- Based on the planned premiums and guaranteed assumptions when will this policy lapse?
- Can you fax/email me the last annual report?
- Order Illustrations: Policy based on current premiums and guaranteed assumptions.
Solve for: premium needed to guarantee policy to maturity