



A New Financial Strategy for Seniors

POLICY EVALUATION FORM

PRODUCER & INSURED'S INFORMATION

PRODUCER'S NAME	COMPANY NAME	DATE
TELEPHONE NUMBER	FASCIMILE NUMBER	E-MAIL ADDRESS
FIRST INSURED	DATE OF BIRTH	MALE/FEMALE
SECOND INSURED	DATE OF BIRTH	MALE/FEMALE

INSURED'S MEDICAL INFORMATION

THIS SECTION IS EXTREMELY IMPORTANT TO PROVIDE A POLICY VALUATION. EITHER ACTUAL OR ESTIMATED TABLE RATINGS AND LIFE EXPECTANCIES MUST BE PROVIDED. ESTIMATES SHOULD BE BASED ON YOUR KNOWLEDGE OF THE INSURED(S) MEDICAL STATUS. ADDITIONALLY, PLEASE BE AS DETAILED AS POSSIBLE WITH REGARD TO THE INSURED'S MEDICAL CONDITIONS AND ILLNESSES.

FIRST INSURED'S TABLE RATING (ACTUAL/ESTIMATED)	LIFE EXPECTANCY (ACTUAL/ESTIMATED)
MEDICAL CONDITION/ILLNESSES	

SECOND INSURED'S TABLE RATING (ACTUAL/ESTIMATED)	LIFE EXPECTANCY (ACTUAL/ESTIMATED)
MEDICAL CONDITIONS/ILLNESSES	

ADDITIONAL MEDICAL CONDITIONS/ILLNESSES	
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LIFE INSURANCE POLICY INFORMATION

INSURANCE COMPANY	FACE VALUE	DATE OF ISSUE
<input type="checkbox"/> Individual <input type="checkbox"/> Group	<input type="checkbox"/> Joint Survivorship	<input type="checkbox"/> Other

TYPE OF POLICY (PLEASE CHECK ONE)			
<input type="checkbox"/> Term	<input type="checkbox"/> Whole Life	<input type="checkbox"/> UL	<input type="checkbox"/> Other

CLASIFICATION OF THE POLICY (PLEASE CHECK ONE)
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PREMIUM COSTS (ANNUALLY)	LOAN AMOUNT	CASH/ACCOUNT VALUE	SURRENDER VALUE
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POLICY OWNER STATE OF RESIDENCE	ADDITIONAL INFORMATION
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ADDITIONAL COMMENTS REGARDING THE POLICY, MEDICAL CONDITIONS AND ANY OTHER DETAILS RELATED
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THIS FORM IS ONLY AN INITIAL ANALYSIS OF QUALIFICATION, ANY OFFERS OR ESTIMATES OF THE POLICY EVALUATION WILL NOT ME GUARANTED UNTIL THE MEDICAL AND INSURANCE UNDERWRITING HAS BEEN COMPLETED.

Not For Consumer Distribution • For Agent Use Only

NOTE: The life settlement quote given will be based on a ten (10) year life expectancy, and will assume that the full premium for the current year has been paid. Please note that quotes will be given for existing policies on clients over the age of 75.

Disclaimer: Alantra Life Settlements is a settlement broker and not a provider. Once a quote is presented verbally or in writing, the amount(s) expressed therein by Alantra Life Settlements (Life Settlement Quote) is an estimate only and does not in any manner represent present, past, or future guaranteed offers, statements, percentages, or amounts. Life settlement amounts are based on numerous factors. Actual results will vary. This statement is not intended to offer or create a binding contract. Any offer for a contract will be binding only if and when a formal written agreement has been fully executed by all parties and all conditions set forth in such agreement have been satisfied