



REQUEST FOR INFORCE ILLUSTRATION

To:

(Current Insurance Company)

Customer Name:

DOB:

Policyowner Signature(s) Date Capacity (owner, POA, trustee, etc.)

Re: Policy Number(s):

To Whom It May Concern:

I hereby grant _____ access to any and all information from your company pertaining to me and any of my life insurance policies. Please forward a current status (cash values, loans, etc.) and an in-force illustration on the above referenced insurance policies. The in-force illustration should be run as follows:

Current & guaranteed hypothetical interest rate

Or

Hypothetical rate of return of 0% and _____ 6% _____ 8% Other _____ % (not to exceed 12%)

Type of in-force illustration(s) 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, surrender value and beneficiary designations

Other:

I authorize you to forward this information via fax to

(Name)

at

(fax)

(Signature)