

Please provide the following information:

- Full Name of the Insured
- State of Residence
- Date of Birth (minimum age of 70)
- Net Worth (Estimated Net Worth of \$5MM or greater)
- Insurance Coverage in Force
- Max Face Amount per Life = \$10,000,000
- Your Name, Your Assistant's Name and how you would like to be contacted
- Status of the offer - Fully Underwritten or Tentative
- Illustration run in state of residence
- An LE provided by AVS

Life Insurance Illustration Tips

- Use Current or Guaranteed product
- Run to age 105. The policy should not lapse before age 105
- Year 1 – Enough Premium to ensure that there will be no premiums through year 3
- Year 2 – No Premium
- Year 3 – No Premium
- Beyond Year 3 – Minimum COI's until age 105
- Must meet minimum premium finance commitments. \$500,000
- Permitted carriers and product:
 - Lincoln – LifeGuarantee Plus
 - Sunlife
 - Guardian
 - Transamerica

Our Preferences

Please forward unsecured pdf's of your illustrations. This format allows us to quickly copy and input data into our model.

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