

Illustration Request Form

Confidential

Name: _____ Spouse: (if SUL) _____
Last First MI First MI

DOB: _____ SSN: _____ DOB: _____ SSN: _____

CASE TYPE DETAILS

- Individual, Survivorship, Fixed Guaranteed, Fixed Non-Guaranteed, Indexed, Variable, Whole Life, Term: _____ Years

RATINGS:

Please select the rating criteria that BEST corresponds with the insured's health.

- Super Pref., Preferred, Standard, Sub-Standard

CASE GOAL (Selected ONE only)

Case goals indicate what your case designer will seek to optimize. Insert criteria below and select ONE case goal. If you would like to see various aspects of the case optimized, you must submit an illustration request form for each goal.

Example: If you want to see the max DB available for a given premium AND the lowest premium for a given DB, an individual illustration request form must be submitted for each of the two scenarios.

- Mazimize DB, Maximize Duration, Minimize Premium, Other: _____

CASE CRITERIA

Case criteria must be inputted to allow the case design team to solve for the goals listed above. Please do not fill in the criteria associated with the goal selected unless it to is a necessity. Case criteria override case goals. If the goal cannot be met subject to your listed crietria, illustrations will not be created.

Example: If Maximize DB is selected and no criteria is listed for DB below, we will solve for the maximum DB subject to the other requirements. If Maximize DB is selected and a minimum DB criteria is provided, we will only create illustrations if the maximized DB is greater than or equal to the provided DB. Otherwise, we will inform you that the desired case design is not possible.

Death Benefit: _____ Age at Endowment: _____
Age Guaranteed: _____ Cash Value: _____ at age _____
Age Non-Guaranteed: _____ Premium: _____

- Premium Mode: Single-Pay, Semi-Annual, _____ Pay, Quarterly, Annual, Monthly

CARRIER INFO

- All Carriers, Other: _____

CASE PLAN

PRODUCER INFO

Ag. of Rec. _____ Split 1: _____ %: _____ Initials _____
Agency: Adv. Svcs. Split 2: _____ %: _____
CWA Split 3: _____ %: _____