CLIENT DATA SHEET

Did you ask for referrals?

	INSU	RED 1		INSURED 2					
NAME				NAME					
DOB		AGE		DOB		AGE			
PHONE				PHONE					
ADDRESS				ADDRESS					
Banking	checking 1 3	direct exp Wed	prepaid Bi-Weekly	BANKING	checking 1 3	direct exp Wed	prepaid Bi-Weekly		
	FACT	FIND		FACT FIND					
SS SSD SSI Medicare Medicaid				SS SS	D SSI	Medicare	Medicaid		
Supplement:	•		FS:Y/N	Supplement:			FS:Y/N		
	SAVINGS	CHECKLIST		SAVINGS CHECKLIST					
RX []	Dental []	Vision []	Hearing []	RX []	Dental []	Vision []	Hearing []		
			ricaning []			¥131011 []	ricaning []		
Life Benefit				Life Benefit					
	UNDERWRITING				UNDERWRITING				
Condition	Date	Drill D	owns	Condition	Date	Drill D	owns		
Tobacco	Y/N	Quiting?		Tobacco	Y / N	Quiting?			
Heart Attack		CHF*	Nitro	Heart Attack		CHF*	Nitro		
A-Fib		Pacemaker	Defib	A-Fib		Pacemaker	Defib		
Stroke				Stroke					
Diabetes		Insulin	Neuropathy	Diabetes		Insulin	Neuropathy		
Cancer			thin 2 years?*	Cancer		Treatment wit	hin 2 years?*		
COPD		Oxygen*		COPD		Oxygen*			
MS / Lupus				MS / Lupus					
Liver/Kidney		Dialysis*		Liver/Kidney		Dialysis*			
HIV* / HEP		Treated?		HIV* / HEP		Treated?			
Bi-Polar/Schizo				Bi-Polar/Schizo					
Memory*				Memory*					
Hospitalized		How Long:		Hospitalized		How Long:			
	MEDIC	ATIONS		MEDICATIONS					
	Diagnosis	Oxygen, Dialysis, Alzheimer's/dementia, HIV, Organ Transplant Congestive Heart Failure (CHF), Cancer (<2 yrs), Heart/Stroke/Circulatory (<12 months)							
RED FLAGS	RX	Antabuse, Aricept, Azathioprine, CellCept, Cognex, Digoxin, Disulfiram, Donepezil							
		Entresto, Exelon, Imuran, Memantine, Mycophenolate, Mofetil, Namenda, Namzaric, Prograf							
		Rapamune, Rapamycin, Razadyne, Rivastigmine, Suboxone, Subutex, Tacrolimus, Zubsolv							

Client Name:			POLICY	REVIEW Is this their only policy with you?						
	Poli	су 1		Policy 2						
Company		Policy #		Company		Policy #				
					- Dala					
Effectiv	'e Date	Draft Day		Effective Date		Draft Day				
Face Amount		Premium		Face Amount		Premium				
Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)	Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)			
Loan Balance	Interest Rate			Loan Balance	Interest Rate					
Poducoc	d Paid Up			Poduco	d Paid Up					
<u>Keduce</u>				Keduced						
	Benefi	ciaries		Beneficiaries						
	NO	TES		NOTES						
	Poli	cy 3		Policy 4						
Com	pany	Policy #		Company		Policy #				
Effective Date		Draft Day		Effective Date		Draft Day				
		Dromium		Face Amount		Premium				
Face Amount		Premium				FIEITIIUTT				
Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)	Cash Value	Surrender Value	Future Premiums (Term)	Cost of Ins (UL)			
Loan Balance	Interest Rate			Loan Balance	Interest Rate					
Poducoc	l Paid Up			Paduca						
Reduced Paid Up				Keduced	d Paid Up					
	Benefi	ciaries		Beneficiaries						
	NO	TES		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 										