

The Trusted Choice

Client's Full Name:	DOB:	A _{	ge: S	pouse's Name		DOB:	Age:
Address:		C	ity:			State:	Zip Code:
 Child/Age	Child/Age	- <u>-</u>	hild/Age		Child/Age		Child/Age
\$				\$			
Client's Monthly Incon	me / Income Sources			-	s Monthly Income		
Medical Conditions (Pl	lease List): Smoker	? Y / N		Medica	al Conditions (Pleas	se List):	Smoker? Y / N
Phone #:		Medic	cal Infori	mation	Email:		
Medications:				Medica	ations:		
\$ Mortgage Balance	\$ Mortgage Payment	——— Mortgage T	Term		<u>\$</u> Equity		
\$ Mortgage Balance	<u>\$</u> Mortgage Payment	——— Mortgage T	Term	\$	\$		Mortgage Due Date
\$ Mortgage Balance Company	\$ Mortgage Payment \$ Death Benefit	——— Mortgage T	ērm e nt Life ir	<u>\$</u> Value	<u>\$</u> Equity <u>\$</u>		
	\$	Mortgage T	ērm e nt Life ir	<u>\$</u> Value <u>nsurance</u>	<u>\$</u> Equity <u>\$</u>	<u>'</u>	Mortgage Due Date
Company Alternative Coverages	\$ Death Benefit \$ Amount	Mortgage T Curre Benefactor	Ferm ent Life in	\$ Value nsurance Company	\$ Equity \$ Death	/ Benefit	Mortgage Due Date
Company Alternative Coverages	\$ Death Benefit \$ Amount	Mortgage T Curre Benefactor	Ferm ent Life in	\$ Value nsurance Company Alternative Cover 401K, TSP, CD's,	<u>\$</u> Equity <u>\$</u> Death	/ Benefit	Mortgage Due Date Benefactor
	Death Benefit \$ Amount , Pension, Etc.)	Mortgage T Curre Benefactor	ent Life in	\$ Value nsurance Company Alternative Cover 401K, TSP, CD's, formation	\$ Equity \$ Death	Benefit	Mortgage Due Date Benefactor
Company Alternative Coverages (401K, TSP, CD's, Cash	Death Benefit \$ Amount , Pension, Etc.)	Mortgage T Curre Benefactor	ent Life in	\$ Value nsurance Company Alternative Cover 401K, TSP, CD's, formation	\$ Equity \$ Death	Benefit	Mortgage Due Date Benefactor \$ Amount
Company Alternative Coverages (401K, TSP, CD's, Cash Do you have Medicare	Death Benefit \$ Amount , Pension, Etc.)	Mortgage T Curre Benefactor Med	Ferm ent Life in A (i	\$ Value nsurance Company Alternative Cover 401K, TSP, CD's, formation	\$ Equity \$ Death	Benefit	Mortgage Due Date Benefactor \$ Amount Y/N
Company Alternative Coverages (401K, TSP, CD's, Cash	\$ Death Benefit \$ Amount , Pension, Etc.) Supplement Plan Plan	Mortgage T Curre Benefactor Med Y/N	ent Life in	\$ Value nsurance Company Alternative Cover 401K, TSP, CD's, formation Do you have Med	\$\$Equity \$ Death rages Cash, Pension, Etc	Benefit	Mortgage Due Date Benefactor \$ Amount Y/N \$
Company Alternative Coverages (401K, TSP, CD's, Cash Do you have Medicare Carrier	\$ Death Benefit \$ Amount , Pension, Etc.) Supplement Plan Plan	Mortgage T Curre Benefactor Med Y/N \$ Premium	Ferm ent Life in A (i	\$ Value nsurance Company Alternative Cover 401K, TSP, CD's, formation Do you have Med	\$ Equity \$ Death rages Cash, Pension, Etc	Benefit	Mortgage Due Date Benefactor \$ Amount Y/N \$ Premium