

# Life Insurance Illustration Request Template



Product Name: \_\_\_\_\_

Client Name: \_\_\_\_\_

Sex: ☐ Male ☐ Female ☐ Unisex

DOB/Age: \_\_\_\_\_

Risk Class: \_\_\_\_\_

State of Issue: \_\_\_\_\_

Death Benefit Amount: \_\_\_\_\_

Premium Amount: \_\_\_\_\_

Premium Stop Age/Year: \_\_\_\_\_

Payment Mode: \_\_\_\_\_

Index Strategy Allocation (Allocation must equal 100%)

MLSB: \_\_\_\_\_

PIMCO: \_\_\_\_\_

S&P 500 High Cap: \_\_\_\_\_

S&P 500 High Cap: \_\_\_\_\_

Disbursement Age: \_\_\_\_\_

Guaranteed to: \_\_\_\_\_

Cash Value Goal: \_\_\_\_\_

CV Goal Year: \_\_\_\_\_

Death Benefit Option: ☐ Increasing ☐ Level

Death Benefit Option Switch Age: \_\_\_\_\_

Riders:

AAS Rider: ☐ 2% ☐ 4% ☐ IRS Max

Death Benefit %: \_\_\_\_\_

Waiver of Monthly Deduction: ☐ Y ☐ N

Waiver of Specified Premium: ☐ Y ☐ N

Accidental DB: Y/N

ADB units (25-250): \_\_\_\_\_

Child Insurance Benefit: ☐ Y ☐ N

# of Units (1-25) \_\_\_\_\_

Select Income Rider: ☐ Y ☐ N

% of DB to Spread (10-100): \_\_\_\_\_

# of Installments: ☐ 10 ☐ 20 ☐ 30

Policy Design Notes/Goal/Agent information:

Policies issued by **American General Life Insurance Company** (AGL), Houston, TX except in New York, where issued by **The United States Life Insurance Company in the City of New York** (US Life). **AGL does not solicit, issue or deliver policies or contracts in the state of New York.** Guarantees are backed by the claims-paying ability of the issuing insurance company and each company is responsible for the financial obligations of its products. Products may not be available in all states and features may vary by state. Please refer to your policy.

All companies above are wholly owned subsidiaries of Corebridge Financial, Inc. Corebridge Financial and Corebridge are marketing names used by these companies.

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. Please consult with your financial professional regarding your situation. For legal, accounting or tax advice consult the appropriate professional. © Corebridge Financial, Inc. All rights reserved.