

Date _____

Primary Agent _____

Secondary Agent (if any) _____

AGL Agent Number _____

AGL Agent Number _____

Phone _____

Phone _____

Email _____

Email _____

Client Name _____

Please provide as much detail as possible.

- What is the client's occupation?
- What is the client's net worth?
 - Provide details regarding the assets; asset type, fair market value, liability, ownership interest.
 - If there is a business interest, provide details about the business. Background, entity structure, ownership interest, fair market value. Details regarding the succession plan for the business.
 - Annual income and annual expenses.
- What client concerns are solved with the life insurance solution? What is the insurance need? How was the death benefit determined?
- How was it determined that Premium Finance is the ideal funding mechanism?
 - How does Premium Finance benefit the client?
- How would the client pay the required premiums should bank loan funding not be available in subsequent years?
- What is the exit strategy, other than death, policy loan or withdrawal? What planning is in place?

All commissions will not be released until proof of the fully funded loan is received and the contract is funded.



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