



Informal Case Inquiry Financial Questions and Justification

Application Summary		
Name of client:	DOB:	State of Issue:
Desired Face Amount:	Total Inforce:	
Type of Coverage:		
Owner:	Beneficiary:	
List another Advisors on this case that led to the amount of coverage needed as well as how it is funded, for example client attorney, accountant or other:		

Need
Purpose of the coverage and what you expect to accomplish for your client
How was the amount determined? Attach copies of any analysis that was conducted to determine coverage required
If not addressed above, please provide formula used to determine total line.
Total amount inforce and applied for:

Financial Statements	
Net Worth:	Annual Income:
Adjusted Gross Income (Taxable):	
Premium is x percentage of AGI:	
Assets – Detailed List	



For Real Estate: Provide addresses and ownership structure for all property that comprises Real Estate Holdings (with detailed explanation of ownership interest if not individually owned) Need Valuation.
Provide listing of Investment and Brokerage accounts that comprise Investments:
Provide addresses and royalty %s for any mineral rights (Be prepared to provide copy of most recent royalty check):
Provide any other details regarding assets that comprise the Net Worth:

Premium Financing (if applicable)
Name of program to be used for financing
Explanation of why financing is appropriate as part of this case design
Exit strategy for payoff of loan (<i>Required</i>)