

Date

Re: Policy No.(s): Insert Policy Number(s)
144

Dear Client Name

I am currently reviewing my life insurance coverage and I am requesting the following information on policy No.(s) Insert Policy Number(s) as of Date

- Policy cost basis
- Current policy summary including cash surrender values
- Death benefit
- Taxable gain to date

I am also requesting an in-force policy ledger for policy No. (s) _____ showing all years to age 100, on both a present and guaranteed assumption basis. Please assume current interest rates, as well as mortality and expense rates in the future. In addition, you may assume current premium payments for the life of the policy.

Please accept my signature as authorization to provide the requested information. You may forward illustration to the Financial Advisor listed below:

Send to: Name: _____

Address: _____

Fax: _____

E-mail: _____

Thank you for your prompt attention to this request.

Sincerely,

Policy Holder Name