

# In-Force Illustration Request Form

## Section 1: Policy or Contract Information

Life Insurance Company: \_\_\_\_\_

Policy Number(s): \_\_\_\_\_

Owner Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Are you the person insured? ☐ Yes ☐ No - *if no, indicate the insured person:*

Insured Name: \_\_\_\_\_ Insured DOB: \_\_\_\_\_

## Section 2: Acknowledgment and Authorization

- *I hereby grant third-party financial organization, LifePro Financial Services, Inc., access to any and all information from your company pertaining to me and my life insurance policies.*
- *Please forward a current status (cash values, loans, etc.) and an in-force illustration on the above referenced insurance policies.*
- *I authorize you to forward this information to LifePro Financial Services, Inc.*

Owner Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Section 3: In-Force Requests (ADVISOR USE ONLY)

The in-force illustration should be run as follows:

☐ Current & guaranteed hypothetical interest rate

OR

☐ Hypothetical rate of return 0% ☐ 6% ☐ 8% ☐ Other \_\_\_\_% - *not to exceed 12%*

Type of in-force illustration(s) requested (check all that apply):


☐ Full Pay – pay scheduled premiums all years

☐ Limited Pay – scheduled premium payments stop when values adequate to endow policy

☐ Solve for level premium to endow policy

☐ Current account value, surrender value and beneficiary designations

☐ Other: \_\_\_\_\_

 **ATTN: Life Insurance Company**

Please send the requested information back to LifePro Financial Services via email at [khaden@lifepro.com](mailto:khaden@lifepro.com) or by fax at (858) 777-5334.