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 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

☐ Solve for premiums to carry the policy to maturity

☐ Current account value, surrender value and beneficiary designations

☐ Other: _____