



IUL

Client Name:

Date Of Birth:

Gender:

Male Female

State:

Target Premium:

Spouse Name:

Spouse Date Of Birth:

Pay Until What Age:

Is Tobacco User:

Yes No

UW Rating Class:

Premier

Preferred

Standard

Table 2

Table 4

Table 6

Table 8

Table 10

Table 12

What Are Their Needs:

Lifetime Income

Pass Onto Spouse

Tax Deferral

Pass Onto Children

Tax Free Retirement

Final Expenses

Pay Off Mortgage

Replace Income

Cash Accumulation

Safe Growth

Death Benefit

Additional Comments: