



SIDE-BY-SIDE SUMMARY

GENERAL INFORMATION

Client / Insured Name: _____

Financial Professional: _____

Date Prepared: ____/____/____ *(insurance policies should be reviewed on an annual basis and a copy of this report kept in the client's and representative's files)*

CLIENT'S CURRENT OBJECTIVES

Lower Premiums		Guaranteed Death Benefit (<i>Estate / Legacy Planning</i>)	
Stop Premium Payments (<i>Paid up Death Benefit</i>)		Increase Death Benefit (<i>desired amount: \$_____</i>)	
Cash Value Accumulation (<i>Retirement Planning</i>)		Living Benefits (<i>Long-Term Care / Chronic Illness</i>)	

Category	Existing Policy	Alternative Consideration
Insurance Company:		
Product:		
Underwriting Class:		
Death Benefit:		
Planned Premium:		
Surrender Value:		
Cost Basis:		
Loan:		
Guaranteed Coverage Period:		
Cash Value @ Age: _____		
Death Benefit @ Age : _____		
Side by Side Comparison of Specific Policy Benefits (<i>if applicable based on stated objectives above</i>)	Existing	Alternative
Death benefit guaranteed to or beyond average life expectancy		
Death Benefit can be accelerated during life for long-term care expenses		
Policy provides flexible premium options if needed		
Policy has a waiver of premium option in case of disability		

Additional Comments / Notes (if applicable)

Approved for consumer use under the guidance of a financial professional

Most insurance policies contain exclusions, limitations, reductions of benefits, and terms for keeping them in force. Ask your financial professional to provide you with costs and complete details. Guarantees are based on the claims-paying ability of the issuing insurance company. AIMCOR Group, LLC is not an insurer and does not issue contracts for coverage. This material is being provided for informational or educational purposes only and does not take into account the investment objectives or financial situation of any client or prospective clients. **The information is not intended as investment advice**