

# ASSET-BASED LTC WORKSHEET

## INDIVIDUAL PLANNING

<b>OPPORTUNITY #1</b>	CHECK ONE: INDIVIDUAL _____ or COUPLE _____		
Client 1 – Name: _____	DOB: _____	Tobacco Y__N__	
Client 2 – Name: _____	DOB: _____	Tobacco Y__N__	
<b>Payment / Funding Option:</b> <i>(Check both if you'd prefer to be presented with multiple options)</i>			
Single Pay: _____	Level Pay (Annual): _____	<i>If level pay:</i> Lifetime: _____	10-pay _____ 5-pay _____
<b>Funding Source:</b>			
Cash / Cash Equivalent _____	Qualified Funds: _____	NQ Annuity: _____	Income: _____

<b>OPPORTUNITY #2</b>	CHECK ONE: INDIVIDUAL _____ or COUPLE _____		
Client 1 – Name: _____	DOB: _____	Tobacco Y__N__	
Client 2 – Name: _____	DOB: _____	Tobacco Y__N__	
<b>Payment / Funding Option:</b> <i>(Check both if you'd prefer to be presented with multiple options)</i>			
Single Pay: _____	Level Pay (Annual): _____	<i>If level pay:</i> Lifetime: _____	10-pay _____ 5-pay _____
<b>Funding Source:</b>			
Cash / Cash Equivalent _____	Qualified Funds: _____	NQ Annuity: _____	Income: _____

FINANCIAL PROFESSIONAL INFORMATION	
Representative Name: _____	
Broker Dealer / Financial Institution Affiliation <i>(if applicable)</i> : _____	
Primary Phone: _____	Secondary Phone: _____
Email Address: _____	

**Please return this completed form to your AIMCOR office. We will run an analysis based on the information provided and contact you to discuss potential options.**

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