

# Life Settlement Forms Checklist

GET STARTED

## What does a Policy Owner need to do to get started on a life settlement evaluation?

There are TWO parts to pricing a life policy.

- The cost to maintain the policy through life expectancy
  - The health of the insured

[www.crescentlifeselements.com](http://www.crescentlifeselements.com)

### Get started by submitting the following:

\_\_\_\_\_ Life Settlement Application

(Signed by Policy Owner and Insured)

\_\_\_\_\_ Authorization for Release of Policy Information

(Signed by the Policy Owner)

\_\_\_\_\_ Confidential Health Questionnaire

### Additional Items needed that we can help you collect

\_\_\_\_\_ Copy of the Original Policy (electronic)

\_\_\_\_\_ Premium History on the Policy

\_\_\_\_\_ Copy of the Trust (if trust owned)

\_\_\_\_\_ 5 Years of medical records from primary care doctor/specialist

\_\_\_\_\_ Current Annual Statement on the Life Policy

\_\_\_\_\_ Illustrations (Current in-force, Solve for Zero cash value at Age 100 and Age 105. )

- Every case is unique and may require more information.
- For a Quick Look– send a Health Summary and the illustrations