



INDIVIDUAL PLANNING

EXISTING COVERAGE AND ALTERNATIVE CONSIDERATIONS



SIDE-BY-SIDE SUMMARY

GENERAL INFORMATION		
Client / Insured Name: _____		
Financial Professional: _____		
Date Prepared: ____/____/____ <i>(insurance policies should be reviewed on an annual basis and a copy of this report kept in the client's and representative's files)</i>		
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

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