

# Life Quote Request



## Agent Information:

**Name:**

**Phone:**

**Email:**

**Quote Need By Date:**

## Client Information:

**Name:**

**Sex:**

**D.O.B.:**

**State of Policy Issue:**

**Anticipated Rate Class:** Preferred; Standard; Substandard (Include considerations below)

**Tobacco Use?** Yes / No

**Underwriting Considerations:**

**Policy type:** UL; IUL; WL; Term – If term, term length:

**Concept (goal):** Guaranteed DB; Accumulation; Systematic Income (Policy Loans)

**If Policy Loan, what year to start policy loans?**

**Funding:**

**Desired premium:**

**Mode:** Annual; Monthly; Other

**Desired length of premium:**  
amount)

; Solve for premium (must include desired face

**Face amount:** Min, Max, Solve for desired:

(must include desired premium)

**Additional notes:**