

**LIFE INSURANCE POLICIES**

*in lieu of completing this page, provide the most recent statement or summary of each policy currently in force*

|                      |       |       |       |       |       |
|----------------------|-------|-------|-------|-------|-------|
| type of policy       | _____ | _____ | _____ | _____ | _____ |
| carrier              | _____ | _____ | _____ | _____ | _____ |
| policy #             | _____ | _____ | _____ | _____ | _____ |
| owner                | _____ | _____ | _____ | _____ | _____ |
| insured              | _____ | _____ | _____ | _____ | _____ |
| beneficiary          | _____ | _____ | _____ | _____ | _____ |
| issue date           | _____ | _____ | _____ | _____ | _____ |
| term / expiry        | _____ | _____ | _____ | _____ | _____ |
| face amount          | _____ | _____ | _____ | _____ | _____ |
| premium \$\$         | _____ | _____ | _____ | _____ | _____ |
| frequency            | _____ | _____ | _____ | _____ | _____ |
| term payable         | _____ | _____ | _____ | _____ | _____ |
| death benefit        | _____ | _____ | _____ | _____ | _____ |
| cash value           | _____ | _____ | _____ | _____ | _____ |
| CSV used for         | _____ | _____ | _____ | _____ | _____ |
| loan balance         | _____ | _____ | _____ | _____ | _____ |
| term illness benefit | _____ | _____ | _____ | _____ | _____ |
| prem refund?         | _____ | _____ | _____ | _____ | _____ |