



Life Insurance Review Fact Find for Trustees

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Life Insurance Review Fact Find for Trustees



General information on Lives Insured

Insured name: _____ Date of Birth: _____

Insured name (if Joint Life Policy): _____ Date of Birth: _____

Purpose of Insurance: _____

Type of Policy: _____

Specific information for each Life Insurance Policy

Name of Policy: _____ Policy No: _____

Insurance Company: _____ Type of Policy: Term / WL / UL / VUL / 2nd to Die

Date Policy Issued: _____ Company Financial Ratings then: _____ Financial Ratings today: _____

Policy owner: Insured / Spouse / Trust / Company / Children / Other: _____

Insured's underwriting class at issue: _____ Expected underwriting class today: _____

Policy Death Benefit: _____ Policy Premium: _____

Multi-pay Premium Period: _____

Policy Crediting Rate on Issue Date: _____ Policy Crediting Rate History and Rate Today: _____

Policy Riders and Unique Features: _____

Do any riders terminate before death? When and how? _____

Is policy convertible / exchangeable to any other policies? Which ones: _____

Date of Last Inforce Illustration: _____

Policy's Current Loan Balance: _____ Current Surrender Amount: _____

Is their Premium Finance on Policies? If so, what is the Loan to current cash surrender value? _____

Loan Interest Rate: _____ Loan Term: _____

Policy performance over time

Policy Identification: Policy:

Insurer:

Type:

I. Projection from Original Illustration for Current Policy Year

Year	Death Benefit	Annual Premium	Cash Surrender Value	Surrender Charge	Total Premiums	Company Ratings
Today						
+5 Years						
+10 Years						

II. Values Today from Current Inforce Illustrate at Current Crediting Rate

Year	Death Benefit	Annual Premium	Cash Surrender Value	Surrender Charge	Total Premiums	Company Ratings
Today						
+5 Years						
+10 Years						

From our headquarters in Dubai in the Middle East, **Capital For Life** provides global reach of life insurance services to Trustees and their clients.

We understand the international Trustee market and the importance of having good partners to work with in specialist areas such as life insurance. We are a team of independent professionals who offer and finance life insurance policies for clients worldwide. Collectively, we have over 150 years of experience that stretches from insurance and banking to trusts and offshore companies.

If you have any questions, or would like to learn more about how you can work with one of the world's leading independent insurance and finance brokers, please get in touch.

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