

# National Brokerage Policy Review



<b>Section A: General Information</b>	
Agent:	Date:
<b>Section B: Client Information</b>	
First, Middle, Last Name:	
Date of Birth:	State of Residence:
<b>Section C: Current Policy Information</b>	
Carrier:	Policy Date:
Policy Type (Term/UL):	Plan Name:
Face Amount:	Rate Class:
DB Option:	Ownership Type:
Cost Basis:	Tobacco (Type, Amount, Last Used):
Cash Surrender:	
Annual Premium:	
<b>Section D: Other Information</b>	
Current Health Issues:	
Are health issues different than when originally applied for life insurance?	
What is the objective? (Optimum face amount, level period and premium + mode)	