

LIFE INSURANCE REVIEW PROGRAM



Prescription for Life At-A-Glance Summary Worksheet

This summary worksheet tool is designed to help you and your clients organize, evaluate, and analyze existing insurance coverage to see if it meets current client needs. Clients or their family members may have experienced a changing life event and now could possibly benefit from a current needs analysis. Whatever the outcome, they will be refreshed on what they do have, and know that it is appropriate for their current needs.

Note: Please use a separate sheet for each existing in-force policy.

| | | | | |
|--|-----------------------|------------------------------------|-----------------|-------------------------|
| Review Date: | | Reviewed by: | | |
| Review Source(s): | Actual Contract | Employer | In-Force Ledger | Other |
| Insured 1: | DOB: | Smoker: | | Table Rating: |
| Insured 2: | DOB: | Smoker: | | Table Rating: |
| Policy Information: | Policy No. | | In-Force Date: | |
| Contract Owner: | | | | |
| Insured | Spouse | Other Family | Business | Irrevocable Trust |
| Current Carrier Name: | | Policy Issue Date: | | |
| Policy Type: | Single Life | Joint Life | | Dividend Option: |
| Riders: | Death Benefit Option: | | | |
| Base Face Amount: \$ | Term Amount: | PUA: \$ | | Total Death Benefit: \$ |
| Premium: Base: \$ | Term: | Rider(s): | | Total: \$ |
| Cash Value: Base: \$ | PUA: \$ | Total Policy Value: | | Net CSV: \$ |
| Are there any loans on the existing contract? | | If yes, the loan amount: \$ | | |
| Yes | No | | | |
| Is this policy classified as a Modified Endowment Contract (MEC)? | | Yes | No | |

| | | |
|-------------------------------|------|--------------------------------------|
| Policy lapses in year: | Age: | Policy Performance Summary |
| Policy lapses in year: | Age: | at current crediting rates. |
| Policy lapses in year: | Age: | at current crediting rates minus 1%. |
| | | at current guaranteed rate. |

Guaranteed Death Benefit Amount: \$

| | | | |
|--------------------------|----------------|----------------|----------------|
| Rider Summary: | Rider 1 | Rider 2 | Rider 3 |
| Rider Name: | | | |
| Cost or Included: | \$ | \$ | \$ |

Policy Summary and Recommendations:



INSURANCE MARKETPLACE
STANDARDS ASSOCIATION

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All guarantees are based on the claims-paying ability of the issuing company, either Sun Life Assurance Company of Canada (Wellesley Hills, MA), Sun Life Assurance Company of Canada (U.S.) (Wellesley Hills, MA), or in New York, Sun Life Insurance and Annuity Company of New York (New York, NY). All are members of the Sun Life Financial group of companies.

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