



(860) 761-3773 info@wardbrokerage.com FX: (860) 606-8019

Request for Proposal

Agent: _____ PH: _____ E-Mail or FX: _____

Client: _____ State: _____ Sex: M <> F <> DOB: __/__/____

Tobacco: No <> Yes <> Type: _____ Quit When? _____ Height: _____ Weight: _____

Health: Excellent <> Good <> Fair <> Poor <> Medications: _____

Health History: _____

Death Benefit: _____ Specified Carrier: _____

Mode: Annual <> S/A <> Quarterly <> Monthly <> Desired Premium: _____

Product Type:

Term: ART <> 10YLT <> 15YLT <> 20YLT <> 30YLT <> Return of Premium? Yes <> No <>

UL: Guaranteed <> Interest Sensitive <> Coverage to Age: 85 <> 90 <> 95 <> 100 <> 105 <> Gtd <>

Cash Value Target: Endow <> Specific Amount: _____ Age: _____

% Rate: Current <> Other: _____% Testing: GPT <> CVAT <>

Premium Years: All Years <> # Years: _____ Lump Sum or 1035x: _____

Whole Life: % Base: _____ % Term: _____ Premium Years: All Years <> Natural <> # Years: _____

Paid-Up Additions Rider: No <> Yes <> Amount: _____ Other: _____

Indexed Life or VUL: Specific Premium Amount: _____ Annual <> S/A <> Q <> Monthly <>

Cash Value Target: Max Premium <> Endow <> Cash Value: _____ @ Age: _____

Income Target: _____ Ages: 65-80 <> 65-85 <> 70-85 <> 70-90 <>

Other: _____

Premium Years: All Years <> # Years: _____ to Age: 50 <> 55 <> 60 <> 65 <> 70 <> 75 <>

Assumed Rate of Return: _____% Alternate Rate of Return: _____% Testing: GPT <> CVAT <>

Term Blend %: _____ Gtd DB Rider: No <> Yes <> to Age: 85 <> 90 <> 95 <> 100 <> 105 <> Gtd <>