

Life Insurance Policy Checklist

Insured:	
Insurer:	#
type: term <input type="checkbox"/> permanent <input type="checkbox"/> other <input type="checkbox"/> <hr/> premium \$ _____ a <input type="checkbox"/> sa <input type="checkbox"/> q <input type="checkbox"/> m <input type="checkbox"/>	issue date: _____ <hr/> expiration: _____ amount: \$ _____

Beneficiary(s) :
primary _____ **contingent** _____

revocable **irrevocable** **per stirpes** **per capita**

Owner _____

Purpose of policy:

- Family income**
- Mortgage**
- Education protection**
- Retirement**
- Business protection**
- Other** _____

Does policy have:

- a. Term rider** **premium** _____ **amount \$** _____
- b. Accidental death** **premium** _____
Amount \$ _____
- c. Future purchase option**
Amount \$ _____ **dates** _____
- d. Family rider**
 - Spouse** **type** _____
 - Amount \$** _____
 - Conversion option**
 - Children** **type** _____
 - Amount \$** _____
 - Conversion option**
- e. Common disaster protection**
- f. Correct information in application**
- g. Dividend option:**
 - 1. paid in cash**
 - 2. reduce premium**
 - 3. accumulate at interest** *
**is owner aware of tax treatment*
 - 4. purchase addition insurance**
 - 5. other** _____
- h. Accelerated benefit**
amount \$ _____
qualification(s) _____
- i. automatic premium loan**

Loan interest rate _____ %