

Please print or type all information

Proposed insured _____ Date of birth _____ Identification Number _____

1. Income

		Current year	Last year
A. Annual earned income (salary, wages, bonus, commissions)	\$	_____	\$ _____
B. Other income (dividends, interest, etc.)	\$	_____	\$ _____

2. Net Worth

A. Assets (savings, stocks, real estate, personal property, etc.)	\$	_____
B. Liabilities (mortgages, loans, other debt)	\$	_____
C. Net worth (A minus B)	\$	_____

3. Purpose Of Coverage

(If business insurance, please also complete Section 4, below.)

A. _____ Personal Family protection Estate conservation Other *(Explain in Remarks)*
 B. _____ Business Key employee Buy-sell Creditor Other *(Explain in Remarks)*

If key employee, are other key employees similarly insured? Yes No

If buy-sell, are the other co-owners similarly insured? Yes No

If creditor, please enter amount of loan. \$ _____

Name and address of lender _____

Does the lender require this life insurance? Yes No

If the answer to any of the above questions is 'No', please explain in Remarks.

4. Business Insurance Data

Business net worth		Estimated business income	
A. Estimated assets	\$ _____	Current year	\$ _____
B. Estimated liabilities	\$ _____	Last year	\$ _____
C. Net worth (A minus B)	\$ _____		
D. Estimated fair market value of business	\$ _____		
E. Percent of business owned by proposed insured	_____		

Any additional data that will document a realistic financial evaluation of the business should be attached.

Remarks: _____

I understand that this declaration is a material part of this personal fact sheet and will be relied upon by the Company in determining my insurability. I understand that any material misstatement in this declaration, or elsewhere in this personal fact sheet, will render the policy, if issued, voidable. I declare that the above answers are true and complete and shall form part of the personal fact sheet on my life.

Dated at _____ this _____ day of _____ (month, year)

Witness _____ Signed _____
(Proposed Insured)