Our Focus Strategy Approach™ allows us to design a specific personal or business insurance portfolio for you. Just check off or fill in the items below to get started. It's that simple! We'll then contact you by phone to complete your insurance analysis—a face-to-face meeting is never required.

❑ **Individual Health Insurance**

❑ **Term Life Insurance**
Amount $________
Term Length Desired:
❑ 10 years
❑ 15 years
❑ 20 years
❑ 30 years

❑ **Guaranteed Universal Life to Death** (like a Term to Death)
Amount $________

❑ **Whole Life**
Amount $________

❑ **Business Continuation Buy-Sell Life**
Amount $________
Term Length Desired:
❑ 10 years
❑ 15 years
❑ 20 years
❑ 30 years

❑ **Key Person Life** (will need to collect health and lifestyle information on the key person)
Amount $________
Term Length Desired:
❑ 10 years
❑ 15 years
❑ 20 years
❑ 30 years

❑ **Loan Protection Planning**
❑ Life Only
❑ Disability Only
❑ Disability and Life (will need a copy or draft of loan agreement)

❑ **Personal Disability Income Insurance**
Will need a copy of the most recent personal tax return and current W2 if available)

❑ **Overhead Disability Income Insurance**
Will need a copy of the most recent personal tax return and current W2 if available)

❑ **Key Person Disability:**
Will need to collect health and lifestyle information on the key person)

❑ **Business continuation Buy-Sell Disability Income Insurance**
Amount $________
Elimination period ________

❑ **Long-Term Care Insurance**
❑ Self only (will need to collect health and lifestyle information)
❑ Self and spouse (will need to collect health and lifestyle information on both of you)

- ❑ **Fixed Annuity** with guaranteed minimum withdrawal benefit (GWMB)
- ❑ **Estate Preservation** (Second to die life insurance (will need to collect health and lifestyle information on both of you)
- ❑ **Tax-Free Exchange** (IRS 1035) existing life insurance or variable annuity to fixed annuity with 8% guaranteed minimum withdrawal benefit (GWMB)
- ❑ **Other (please list)**

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