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## LIFE SETTLEMENT QUICK QUOTE FORM

Please choose the appropriate score for each of the following questions regarding the insured in the boxes provided. Add the points and compare with the table below for a life settlement probability.

Policy Face Amount  
 \$500,000 or More

Life Insurance Carrier  
 Rated A- or better

Insured is a US Citizen

### 1. INSURED'S AGE & GENDER

- Male < or = 69 / Female < or = 71.... 1
- Male 70 – 75 / Female 72 – 77..... 2
- Male 76 – 81 / Female 78 – 83 ..... 3
- Male 82 – 87 / Female 84 – 89..... 4
- Male > or = 87 / Female 90 or Older.. 5

### 2. INSURED'S MEDICAL CONDITION

- In Good Health..... 1
- Minor Health Issues..... 2
- Hypertension, hyperlipidemia, ulcers, glaucoma, non-recurring/diagnosed cancer over 5 years ago, Minor skin disease, asthma, arthritis, obesity
- Moderate Health Issues..... 3
- Hepatitis, atrial fibrillation, diabetes, COPD, memory loss, pacemaker, depression, multiple sclerosis
- Serious Health Issues..... 4
- Alzheimer's disease, cancer, stroke, cirrhosis, artery disease, blood diseases, heart attack (in the last 18 months), multiple sclerosis

### 3. INSURED'S POLICY TYPE

- Whole Life..... 1
- Survivorship..... 2
- Term – Convertible..... 3
- Universal..... 4
- Survivorship w 1 Deceased..... 5

### 4. POLICY LOAN AMOUNT

- 31 or More %..... 1
- 21 – 31 %..... 2
- 11 – 21%..... 3
- 0 – 10 % ..... 4

### 5. CASH SURRENDER VALUE

- 21 or More %..... 0
- 16 – 20 %..... 1
- 11 – 15 %..... 2
- 6 – 10 %..... 3
- 0 – 5 %..... 4

### 6. ANNUAL PREMIUM

- 4 or More %..... 1
- 3 – 4%..... 2
- 2 – 3 %..... 3
- 0 – 2 %..... 4

QUICK QUOTE TOTAL	
Very Unlikely, Call to discuss	7 or Less
Unlikely, Call to discuss	8 - 13
Likely, Call to proceed	14 - 19
Highly Likely, Call to proceed	20 - 25
<b>TOTAL =</b>	<input type="text"/>

\_\_\_\_\_  
 Name of Submitting Agent

\_\_\_\_\_  
 Insured Name

\_\_\_\_\_  
 Agent Phone

\_\_\_\_\_  
 Policy Issue Date

\_\_\_\_\_  
 Agent Email

\_\_\_\_\_  
 Policy Maturity Date