

**NEW CLIENT - LIFE INSURANCE**

Life insurance is an often overlooked and under planned asset in estate planning. As with other financial assets, correct and current information on life insurance policies is a must for a comprehensive estate plan. Please list below the company name(s), policy number(s), owner's name, insured's name and primary beneficiary for the life insurance policies currently in force. We will then prepare for your signature an authorization letter requesting each company to provide a policy summary.

		Company Name	Policy Number	Face Value	Owner	Insured	Primary & Contingent Beneficiary
Life Insurance	1						
	2						
Group Insurance	1						
	2						
Term Insurance	1						
	2						
Whole Life or Universal Insurance	1						
	2						
Long Term Care	1						
	2						
Disability Insurance	1						
	2						
Other Insurance	1						
	2						