

LIFE SETTLEMENT INFO

www.LifeSettlementInfo.com

Toll Free: 1-888-823-7764

Total Score	Life Settlement Qualify
6 or less	Highly unlikely
7 – 12	Unlikely – Please call us to discuss
13 – 18	Average - Contact client to complete application
19 - 24	Highly Likely - Contact client to complete application

LIFE SETTLEMENT WORKSHEET

Client Name	Score	Policy #
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Please rate each category and add the points for a total score. Compare the score with the table above for a Settlement Probability.

Client age and sex:	Points:
<input type="checkbox"/> 1 Point Male age 74 or less/ Female age 77 or less <input type="checkbox"/> 2 Points Male age 75 - 78/ Female age 78 - 81 <input type="checkbox"/> 3 Points Male age 79 - 83/ Female age 82 – 86 <input type="checkbox"/> 4 Points Male age 84 +/ Female age 87 +	
Medical Condition:	Points:
<input type="checkbox"/> 1 Point Healthy senior <input type="checkbox"/> 2 Points Has a minor health problem <input type="checkbox"/> 3 Points Health has changed considerably since policy issue <input type="checkbox"/> 4 Points Client has developed a terminal illness	
Policy Type:	Points:
<input type="checkbox"/> 1 Point Joint Survivorship or Whole Life <input type="checkbox"/> 2 Points Term Life <input type="checkbox"/> 3 Points Universal Life <input type="checkbox"/> 4 Points Joint Survivorship with one deceased	
Current cash surrender value of the policy as a percentage of the death benefit:	Points:
<input type="checkbox"/> 1 Point 30% + <input type="checkbox"/> 2 Points 20% - 30% <input type="checkbox"/> 3 Points 10% - 20% <input type="checkbox"/> 4 Points 0% - 10%	
Outstanding loans as a percentage of the death benefit:	Points:
<input type="checkbox"/> 1 Point 30% + <input type="checkbox"/> 2 Points 20% - 30% <input type="checkbox"/> 3 Points 10% - 20% <input type="checkbox"/> 4 Points 0% - 10%	
Current premiums as a percentage of the death benefit:	Points:
<input type="checkbox"/> 1 Point 4% + <input type="checkbox"/> 2 Points 3% - 4% <input type="checkbox"/> 3 Points 2% - 3% <input type="checkbox"/> 4 Points 1% - 2%	