

INSURANCE TYPES / CLIENT OBJECTIVES

	[Select all that apply.]	Term	ROP Term	Fixed Universal Life	Index Universal Life	Variable Universal Life	Whole Life	Life with LTC	Single Premium Life	Long Term Care (Traditional)	Annuity Fixed or Index	Annuity Variable	Annuity Immediate
1	Temporary Protection 10-, 15-, 20-, 25-, 30-Years	<input type="radio"/>											
2	Temporary Protection 15-, 20-, 30-Years		<input type="radio"/>										
3	Death Benefit Only, No Cash Value	<input type="radio"/>	<input type="radio"/>										
4	Lowest Premium	<input type="radio"/>	<input type="radio"/>										
5	Permanent Protection			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
6	Policy Cash Value			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	
7	Tax Sheltered Access to Cash Prior to Age 59 1/2			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	Flexible to Meet Changing Needs				<input type="radio"/>	<input type="radio"/>					<input type="radio"/>	<input type="radio"/>	
9	Cash Accumulation Account with investment or interest rate mix selection by client				<input type="radio"/>	<input type="radio"/>					<input type="radio"/>	<input type="radio"/>	
10	Low to Moderate Risk Tolerance			<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>
11	High to Moderate Risk Tolerance	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>						<input type="radio"/>	
12	Increasing Death Benefit Without Insurability Concern			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				<input type="radio"/>	<input type="radio"/>	
13	Flexible Premium Payments			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					<input type="radio"/>	<input type="radio"/>	
14	Estate Liquidity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	
15	Long Term Care / Convalescent / Nursing							<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
16	Income Tax Free Death Benefit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
17	Age 0 - 18			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Age 19 - 35	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Age 36 - 45	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Age 46 - 55	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Age 56 - 65	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Age 66 - 70	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Age 71 - 80			<input type="radio"/>			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Age 81 - 85			<input type="radio"/>			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TOTALS													

FOR AGENT USE ONLY

Fill in all selections that apply to client's objectives. Total each column for the number of entries selected in that column. Columns with higher totals are the Insurance Products to focus on for client.

Please review policy-specific features, definitions and limitations, applicable for the State of issue. Life and annuity products vary by State and insurance company. Please contact Imeriti 800-921-3100.