

1. Advisor information

Advisor name:		
Sales Director name:		
Province:	Email:	Phone number:
Return illustrations to: <input type="checkbox"/> Advisor <input type="checkbox"/> Director <input type="checkbox"/> Other		

2. Policy details

Policy type: Individual JLTD Illustration provided Excel extract provided

3. Client details

Type of insurance: Individual JLTD

Policy owner: Individual Corporate (Please provide corporation name below)

Corporation name:

Insured 1

Name: _____ Age: _____ Date of birth:

Y	Y	Y	Y	M	M	D	D

 Smoker Non-smoker

Insured 2 (if JLTD is selected)

Name: _____ Age: _____ Date of birth:

Y	Y	Y	Y	M	M	D	D

 Smoker Non-smoker

4. Tax details

Taxable income: _____ or System default (Highest MTR)

5. Alternative investment details

System default or **Interest income:** Allocation _____% **Dividend income:** Allocation _____% **Capital gain:** Allocation _____%

Return _____% Return _____% Return _____%

6. Retirement cash flow details

Loan amount: \$ _____ or Maximum loans

First loan (age or year): _____ Last loan (age or year): _____

LTV ratio: _____

Interest rate on loan: _____% or System default

Loan taken out by: Shareholder or Corporation

Guarantor fee (if applicable): _____

Options for +1% loan interest rate scenario (select one): Keep the same loan amount of the base scenario Adjust loan amount at +1% rate

INVESTED IN YOU.