



Policy owner Name: _____

Mailing Address: _____

Date: _____

Attn: Policyholder Services

Life Insurance Company Name: _____

Address: _____

Re: Policy Number _____

Insured: _____

Owner (not needed if the same): _____

To Whom It May Concern:

In reference to my life insurance policy (or policies) listed above for which I am the owner, please provide two in force proposals:

- 1) Illustrate to maturity with current premiums based on current interest rate and mortality assumptions;
- 2) Illustrate to maturity the premium required to endow the policy at maturity based on current interest rate and mortality assumptions;

Please also indicate the current surrender value, loan value and basis to date.
If you have any questions, please call. Thank you for your prompt attention to this matter.

Sincerely,

Policyowner: _____