

CHECKLIST

ILLUSTRATION #1

Pay off any policy loan first*, then scheduled WL premiums to maturity, using dividends to purchase paid up insurance.

ILLUSTRATION #2

Pay off any policy loan first*, reduced paid up with no future premiums, using dividends to purchase paid up insurance.

ILLUSTRATION #3

Illustrate the policy as is.

CURRENT POLICY STATEMENT

Separate from illustration to show current values.

COST BASIS OF POLICY

If not included in the account statement.

*If no policy loan exists, please disregard this portion of the request. Also, if the policy is already paid up, we only need Illustration #1