

COMPARE AND CONTRAST

In summary, through all three stages of the transaction process, "Loan for Life" is simple, faster and way less intrusive on your Client's privacy

BY APPLICATION PROCESS

	LIFE SETTLEMENT	"LOAN FOR LIFE"™
INSURED AGE ELIGIBILITY	70	No Minimum
HIPPA RECORDS REQUIRED	✓	✗
MEDICAL RECORDS REQUIRED	✓	✗
LIFE EXPECTANCY REPORTS	✓	✗
LICENSED BROKER REQUIRED	✓	✗
TIME TO PREPARE APPLICATION	3 Weeks Average	3 Days

BY OFFER/APPLICATION PROCESS

	LIFE SETTLEMENT	"LOAN FOR LIFE"™
LICENSED BROKER REQUIRED	✓	✗
REQUIREMENT TO SECURE MULTIPLE OFFERS	✓	✗

BY CLOSING PROCESS

	LIFE SETTLEMENT	"LOAN FOR LIFE"™
CHANGE OF OWNERSHIP/ BENEFICIARY	✓	✗ (Collateral Assignment Only)
INSURED CONTINUING CONTACTS REQUIRED	✓	✗
INSURED POA REQUIRED	✓	✗
BANK ESCROW AGENT INTEGRATED	✓	✓
OWNER PROCEEDS TAXABLE	✓	✗
POST CLOSING MONITORING OF INSURED HEALTH	✓	✗

Not available in all states. Contact us today to see if your policy qualifies.