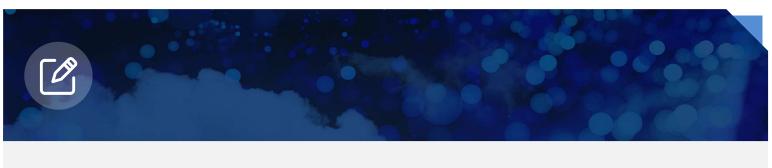




Instructions - Complete all sections below and email to pichie@back9ins.com

Agent Information			
Agent / Business Name		Street Address Including City, State, and ZIP Code	
Telephone		Cell Phone	
Office Email Address		Agent Time Zone	EST CMT PST
Agent License Number		BackNine Marketing Manager (if known)	
IRA Participant Infor	mation		
Participant Name		Resident State Pa	rticipant Sex
Participant's Date of Birth			
Participant's Health Classification	□ Preferred Best □ Preferred	est Preferred Standard Plus Smoker	
	□Standard □Uninsurable	e □Rated	Non-Smoker
Marginal Income Tax Rate to show for years 1 - 10	□ 20% □ 30% □ 40%	Marginal Income Tax Rate to show for years 11 - maturity	□20% □30% □40%
IRA Insured Informa	tion		
Insured Name		Resident State	Insured Sex
Insured Date of Birth		Relationship to the Participant	
Insured Health Classification (circle one)	☐ Preferred Best ☐ Preferred	d ☐ Standard Plus ☐ St	andard 🗆 Uninsurable
Qualified Plan Inforr	mation		
Type of Qualified Plan	□ IRA	Street Address Including City, State, and ZIP Code	
	□ 401K		
	☐ Annuity		
Current PLAN value	\$	Total PLAN contributions (if known)	\$
The portion of PLAN values allocated to Life Insurance Plan	\$	Living Benefits Requested	
Death benefit coverage desired	\$	Chronic Care Long Te	erm Care Cognitive Care



ADDITIONAL CASE NOTES AND INFORMATION

The design process allows for tailored customization of each plan to a participants' particular needs. The presentation design produced utilizing the above input information will be a "balanced design". Meaning that the initial presentation will not be maximized as either a death benefit plan or a loan income plan. Initial designs project a "middle-of-the-road" approach, where one policy issued achieves both death benefit and loan income planning goals.

For questions, contact Paul Pichie at BackNine Insurance & Financial Services, Inc. 1-(818) 221-0010