



IRA Max Plan™ Intake



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 Information

Participant Name		Resident State	Participant Sex
Participant's Date of Birth			
Participant's Health Classification	<input type="checkbox"/> Preferred Best <input type="checkbox"/> Preferred <input type="checkbox"/> Standard Plus <input type="checkbox"/> Standard <input type="checkbox"/> Uninsurable <input type="checkbox"/> Rated_____		Smoker Non-Smoker
Marginal Income Tax Rate to show for years 1 - 10	<input type="checkbox"/> 20% <input type="checkbox"/> 30% <input type="checkbox"/> 40%	Marginal Income Tax Rate to show for years 11 - maturity	<input type="checkbox"/> 20% <input type="checkbox"/> 30% <input type="checkbox"/> 40%

IRA Insured Information

Insured Name		Resident State	Insured Sex
Insured Date of Birth		Relationship to the Participant	
Insured Health Classification (circle one)	<input type="checkbox"/> Preferred Best <input type="checkbox"/> Preferred <input type="checkbox"/> Standard Plus <input type="checkbox"/> Standard <input type="checkbox"/> Uninsurable		

Qualified Plan Information

Type of Qualified Plan	<input type="checkbox"/> IRA <input type="checkbox"/> 401K <input type="checkbox"/> Annuity	Street Address Including City, State, and ZIP Code	
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 Term 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