**NIW Companies Inc 4975 Preston Park Blvd Suite 425 Plano, TX 75093 972-755-1582**

**\*\*\*\*\*Please allow for a 24-48 hour turnaround time\*\*\*\*\***

**KaiZen Design Request Form**

Date Requested: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**In order for NIW to design the prospective case, please do your best to ensure that**

**all the information is provided, incomplete forms will not be processed.**

**Send completed form to *info@kaizenplan.com***

**CLIENT**

**1 Client Name (MUST HAVE) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth \_\_\_\_\_\_\_\_\_\_­\_\_\_**

**2 State of Residence \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Gender (circle) Male Female**

**3 Assumed Health Rating (circle) Standard Preferred Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PLAN DESIGN**

**1 Design Focus (circle) Death Benefit Only Maximum Income Mix (ie; net 2m with income)**

**2 Amount of Death Benefit or Contribution desired\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**3 If Death Benefit listed above, is this the initial DB or net DB after loan repayment? Gross Net**

**4 For Designs with Income, when would the client like to begin making withdrawals? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**CARRIER**

1 Carrier Desired: Minnesota Life Allianz National Life Other \_\_\_\_\_\_\_\_\_­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2 Client Net Worth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Client Annual Income: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date of Meeting \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Producer Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ GA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Producer Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­\_\_\_\_\_\_\_\_\_\_\_\_

If working on a group case, please submit the census of the group which contains the following information:N**ame \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Gender \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Hire \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Salary \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Employer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State of Residence \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Once that has been obtained, NIW will schedule a call to determine the direction and goals of the group**