

Life Settlement Qualifier

Please check appropriate box for questions 1-7.

Add the points for the total score, compare the score with the table below for the Settlement Potential.

1. Insured's age:	Point(s)	Your Score
69 or Less*	1	
70 to 75	2	
76 to 80	3	
81 to 85	4	
86 or Older	5	
2. Insured's gender:		
Female	1	
Male	2	
3. Insured's medical condition:		
Healthy senior*	1	
Minor health problems	2	
Serious health problems	3	
Very serious illness	4	
4. Policy type:		
Whole Life	1	
Survivorship	2	
Term Life	3	
Universal Life	4	
Survivorship with one deceased	4	
5. Does the policy have a loan?		
Yes	1	
No	2	

6. Current cash surrender value % of coverage amount:	Point(s)	Your Score
30% or More	1	
20% - 29%	2	
10% - 19%	3	
9% or less	4	
7. Annual premiums % of coverage amount:		
4% or More	1	
3% - 4%	2	
2% - 3%	3	
1% - 2%	4	
Your Total		

SCORE LIFE SETTLEMENT POTENTIAL

7 Very unlikely – Please call to discuss

8-13 Unlikely – Please call to discuss

14-19 Likely – Please complete application

20-25 Very Likely – Please complete application

AGENT PHONE

CLIENT PHONE

POLICY NUMBER

SCORE

DATE SENT TO ISG

OFFER AMOUNT

CLIENT ACCEPTED: YES NO

*Checking both asterisks may automatically disqualify the case.