

Date: _____

Carrier: _____

RE: Request for Policy Information (Index Universal Life)

To Whom It May Concern:

As owner of the policy issued on the life/lives of _____
_____, policy number(s) _____

we are in need of information to assess the future performance of the policy(ies) owned. By our signature below, we are authorizing your company to release in-force illustration projections to Kayla Gibson. They are conducting a comprehensive insurance assessment and review on our behalf.

Assuming a 6.00% & 4.5% rate of return, the following re-projections are needed:

- a.) Paying necessary annual premium to maturity leaving \$1,000 cash value at age 100 or policy maturity age, if sooner.
- b.) Re-projection assuming no future premiums are made.
- c.) Continue to pay scheduled premium to maturity.
- d.) Please detail cost basis, outstanding loans and any riders or supplemental insured(s) or benefits.

Also, please verify the current beneficiary(s).

Please mail, fax or email the requested information to the aforementioned representative at:

- Address: 7910 E Thompson Peak Pkwy #101 Scottsdale AZ 85255
- Fax: 480-505-2501
- Email: Marketing@bpim.com

Please note: a faxed copy of this request for information shall be deemed valid as the original. Also note, we authorize your company to release any information to the representative noted above whether the request be made in writing or via the telephone.

We ask this request to be processed within 5 business days. Should you have any questions, please direct them to Kayla Gibson @ (480) 505-2500.

Sincerely,

Policyowner