

LIFE INSURANCE PROPOSAL REQUEST

FAX: 847-681-9501

GUARDIAN LIFE

Requested on (date) _____/11

To: Allen Flynn Lanny Levin

From (broker name): _____

Broker's Email: _____@_____

Broker's Telephone (_____) _____

Broker's FAX (_____) _____

Address _____ City _____ State _____ Zip _____

We will email proposals to you unless you indicate otherwise

Need by ____/____ a.m. p.m.

Employer Name, if applicable _____

Classes: NS PrefNT PPlusNT Smoker

Insured Names	Sex	Birthdate (mm/dd/yyyy)	Smoker	Class	Total Face Amount	Or Total Spend Amount
1	<input type="checkbox"/> M <input type="checkbox"/> F		<input type="checkbox"/> Y <input type="checkbox"/> N		\$	\$
2	<input type="checkbox"/> M <input type="checkbox"/> F		<input type="checkbox"/> Y <input type="checkbox"/> N		\$	\$
3	<input type="checkbox"/> M <input type="checkbox"/> F		<input type="checkbox"/> Y <input type="checkbox"/> N		\$	\$
4	<input type="checkbox"/> M <input type="checkbox"/> F		<input type="checkbox"/> Y <input type="checkbox"/> N		\$	\$

1035 Exch. \$ _____ Cash fm old policy \$ _____ Cost Basis of old pol. Previous pol. a MEC? Y N

Exec. Bonus Plan Tax Brackts: Employer _____% Employee _____%

Guardian Single life (all-base) select plan(s) below **Guardian Joint Survivor Whole Life (all base)**

<input type="checkbox"/> WL-99 (Good for blend & long term) (\$25K min)	<input type="checkbox"/> WL-121 (Lowest guaranteed premium) 0-49 (\$250K min) 50+ (\$100K min)	<input type="checkbox"/> WL-95 <input type="checkbox"/> LP65 (Higher early values, earlier offset) (\$25K min)	<input type="checkbox"/> UL <input type="checkbox"/> UltraLife <input type="checkbox"/> UltraMax UltraLife: \$100K min face UltraMax: \$50k min prem, (\$250K min face)	<input type="checkbox"/> Exec Sec. Life <input type="checkbox"/> Achiever Gold <input type="checkbox"/> 20 Pay Life <input type="checkbox"/> 10 Pay Life ExSec: (3 lives, \$100K min prem) AG: \$50k prem, (\$250K min face)	<input type="checkbox"/> Guardian Level Term _____ yrs <input type="checkbox"/> Extd Conversn <input type="checkbox"/> WLPO \$ _____ (\$250K min)	Level Term spreadsheet: _____ years
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Div. Options: Natural Prem. Offset Pay _____ Yrs Continuous Pay Reduce prem

Single Life Term Blends (Portfolio "Q") Use WL99 Use WL121 Use WL95

Joint Survivor WL Blends (Portfolio "Q")

WL	Qterm	Spend Amt	Natural Offset?	OR	Desired Yrs to Pay
<input type="checkbox"/> 75%	25%	\$ _____	<input type="checkbox"/> Yes	<input type="checkbox"/> Min	_____ <input type="checkbox"/> all
<input type="checkbox"/> 60%	40%	\$ _____	<input type="checkbox"/> Yes	<input type="checkbox"/> Min	_____ <input type="checkbox"/> all
<input type="checkbox"/> 50%	50%	\$ _____	<input type="checkbox"/> Yes	<input type="checkbox"/> Min	_____ <input type="checkbox"/> all
<input type="checkbox"/> ____%	____%	\$ _____	<input type="checkbox"/> Yes	<input type="checkbox"/> Min	_____ <input type="checkbox"/> all

Riders: Disability Waiver EABR GIO CWB Max PUA

\$ _____ Age/Adult ____

Dividends Current Scale Alt. Scale Reduced by 0.5% per year to ____% Flat ____%

Show distributions → maximum \$\$ or \$ _____ for ____ yrs starting age _____ MEC okay Yes No

Source of distributions → Surrender of adds only OR Surrender of additions to basis, then loans

Other comments or instructions: _____

Note: 412(e)(3) plans? Call Lanny 847-266-2244. Ask us about Guardian's Executive Security Whole LifeSM (ESWL), a permanent whole life insurance plan for groups with at least 3 lives.