



### TRADITIONAL LIFE SETTLEMENT

**POLICY TYPE:** Convertible Term, Whole Life, Indexed Universal Life, Survivorship Universal Life, Universal Life, Variable Universal Life

**AGE:** 70+  
**FACE AMOUNT:** \$100K +  
**HEALTH:** 4 Tables of Health Change Since Issue

**ACTION:** Illustration to 100, Preliminary Questionnaire

### CONVERT TO CASH

**POLICY TYPE:** Convertible Term Insurance

**AGE:** 63 +  
**FACE AMOUNT:** \$2M +  
**HEALTH:** Standard or Better at Issue

**ACTION:** Conversion Illustration to 100, Preliminary Questionnaire

### GUARANTEED UNIVERSAL LIFE

**POLICY TYPE:** Guaranteed Universal Life

**AGE:** 73+  
**FACE AMOUNT:** \$250K +  
**HEALTH:** Any

**ACTION:** Illustration to 105, Annual Statement, Copy of Policy, Preliminary Questionnaire

### NON-CONVERTIBLE TERM

**POLICY TYPE:** Non-Convertible Term Insurance

**AGE:** Any  
**FACE AMOUNT:** \$100K +  
**HEALTH:** Severe Impairments

**ACTION:** Copy of Policy, Preliminary Questionnaire

### UNIVERSAL LIFE - RESCUE

**POLICY TYPE:** Universal Life  
A+ Rated

**AGE:** 65+  
**FACE AMOUNT:** \$100K+  
**ISSUE DATES:** 1996-2007  
**HEALTH:** Any

**ACTION:** Copy of Policy, Preliminary Questionnaire

### WHOLE LIFE - LOAN RESCUE

**POLICY TYPE:** Whole Life

**AGE:** 50 to 65  
**FACE AMOUNT:** Any  
**CASH VALUE:** \$500k to \$2.5M  
**HEALTH:** Any  
**CARRIERS:** Mass Mutual, Penn Mutual, New York Life, Ameritas, Guardian Life, Northwestern Mutual

**ACTION:** Annual Statement, Preliminary Questionnaire, Illustration with Loan Paid Off Scheduled Premium to Maturity using Dividends to Purchase Paid off Insurance, Illustration with Loan Paid Off Reduced Paid Up with no Further Premiums using Dividends to Purchase Paid Up Insurance

Do you have a case that meets one or more of the criteria listed above? If so, please provide the actionable requirements and we will provide a valuation response within 24-hours. If you have any questions about your case or the LifeRoc life settlement programs, don't hesitate to contact us.