



This form is intended to quickly assess whether a life settlement is a viable option for a prospective candidate and does not guarantee that an offer will be obtained. Simply check the applicable information and add the points for a total score.

PART 1 CLIENT INFORMATION

CLIENT AGE

- | | |
|--|--|
| <input type="checkbox"/> 1 - Point - Make Age 68 or less | <input type="checkbox"/> 1 - Point - Female Age 72 or less |
| <input type="checkbox"/> 2 - Points - Male Age 69-74 | <input type="checkbox"/> 2 - Points - Female Age 73-77 |
| <input type="checkbox"/> 3 - Points - Male Age 75-78 | <input type="checkbox"/> 3 - Points - Female Age 78-81 |
| <input type="checkbox"/> 4 - Points - Male Age 79-83 | <input type="checkbox"/> 4 - Points - Female Age 72-86 |
| <input type="checkbox"/> 5 - Points - Male Age 84 + | <input type="checkbox"/> 5 - Points - Male Age 87 + |

CLIENT HEALTH

- 1 - Point - No Health Issues (Healthy)
- 2 - Points - Minor Health Issues
- 3 - Points - Moderate Health Issues
- 4 - Points - Major Health Issues
- 5 - Points - Terminal Health Issues

PART 2 POLICY INFORMATION

POLICY TYPE

- 1 - Point - Non-Convertible Term or Whole Life
- 2 - Points - Joint Survivorship (both insureds alive)
- 3 - Points - Convertible Term or Variable UL
- 4 - Points - Universal Life or Index UL
- 5 - Points - Joint Survivorship (one insureds deceased) or Guaranteed UL

CURRENT ANNUAL PREMIUM as a Percentage of Death Benefit (to carry to age 100)

- 1 - Point - 4.00% +
- 2 - Points - 3.00% - 4.00%
- 3 - Points - 2.00% - 3.00%
- 4 - Points - 1.00% - 2.00%

CURRENT CASH SURRENDER VALUE as a Percentage of Death Benefit:

- 1 - Point - 30.00% +
- 2 - Points - 20.00% - 30.00%
- 3 - Points - 10.00% - 20.00%
- 4 - Points - 0.00% - 10.00%

OUTSTANDING LOAN as a Percentage of Death Benefit:

- 1 - Point - 30.00% +
- 2 - Points - 20.00% - 30.00%
- 3 - Points - 10.00% - 20.00%
- 4 - Points - 0.00% - 10.00%

TOTAL SCORE ► **ADD POINTS FROM EACH CATEGORY ABOVE FOR A TOTAL SCORE**

Compare the total score with the table below to determine the likelihood of a Settlement

0-6 POINTS
UNLIKELY

7-12 POINTS
SOMEWHAT UNLIKELY

13-19 POINTS
LIKELY

20-30 POINTS
HIGHLY LIKELY

CONTACT US TODAY: 310-819-9489 TO QUICKLY DETERMINE UP-FRONT IF YOUR CASE QUALIFIES FOR A LIFE SETTLEMENT