

Life Insurance Inventory

Presented by: Your Financial Advisor

Prepared for:

Permanent Insurance		
	Policy 1	Policy 2
Company	_____	_____
Policy Number	_____	_____
Agent/Broker	_____	_____
Telephone Number	_____	_____
Type (WL, VL, UL, VUL)	_____	_____
Death Benefit	\$ _____	\$ _____
Premium	\$ _____	\$ _____
Cash Value as of _____	\$ _____	\$ _____
Outstanding Loan	\$ _____	\$ _____
Policy Owner	_____	_____
Beneficiary(ies)	_____	_____
Location of Policy	_____	_____
	Policy 3	Policy 4
Company	_____	_____
Policy Number	_____	_____
Agent/Broker	_____	_____
Telephone Number	_____	_____
Type (WL, VL, UL, VUL)	_____	_____
Death Benefit	\$ _____	\$ _____
Premium	\$ _____	\$ _____
Cash Value as of _____	\$ _____	\$ _____
Outstanding Loan	\$ _____	\$ _____
Policy Owner	_____	_____
Beneficiary(ies)	_____	_____
Location of Policy	_____	_____

Life Insurance Inventory

Presented by: Your Financial Advisor



Prepared for:

Term Insurance

Policy 1

Policy 2

Company

Policy Number

Agent/Broker

Telephone Number

Type (LT, DC, Group Term)

Death Benefit

\$

\$

Premium

\$

\$

Policy Owner

Beneficiary(ies)

Location of Policy

Policy 3

Policy 4

Company

Policy Number

Agent/Broker

Telephone Number

Type (LT, DC, Group Term)

Death Benefit

\$

\$

Premium

\$

\$

Policy Owner

Beneficiary(ies)

Location of Policy