

NewLife Marketing - Life Insurance Plan

Prepared Especially For

Name: _____ Age/DOB: _____ NT / T

Spouse: _____ Age/DOB: _____ NT / T

Children: _____ Ages: _____

Death Benefit: _____ benefit paid *Tax Free*

First Year Required Outlay: \$ _____ A or \$ _____ M

Ongoing Planned Outlay: \$ _____ A or \$ _____ M

Lump Sum Needed: \$ _____

Additional Benefits

Spouse Death Benefit \$ _____ **Outlay** = \$ _____ M

Children's Life Insurance: \$ _____

Covers all children **Planned Outlay** = \$ _____ M

Waiver of Premium: Planned Outlay = \$ _____ M

Disability Income Benefit: If you get sick or hurt,
where will the money come from to pay the bills?

Recommend 60% of income. Benefits are tax free.

Income: \$ _____ x 60% = \$ _____ **Outlay** = \$ _____ M

Projected Cash at 20 Years = \$ _____

Cash at Age 65 = \$ _____

How do you want to put money into your policy? Annual - SA- Qtrly - Mo. Bank Draft

Total First Year Outlay: \$ _____ A or \$ _____ M

Or Lump Sum of \$ _____ **and**

Ongoing Planned Outlay: \$ _____ A or \$ _____ M

Original is to be kept on file by agent. Copy submitted with application.

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