



# PREMIUM FINANCING

## Fact Finding Worksheet

Premium financing helps high-net-worth individuals purchase needed life insurance by leveraging highly appreciating assets. Transamerica's premium finance department can help you determine if premium finance may be a good option for a client. Contact us today at (866) 545-9058 for initial case qualification, case design and sales strategy development.

### Client Information

Age: \_\_\_\_\_ Occupation: \_\_\_\_\_

Annual income: \_\_\_\_\_ Other sources of income: \_\_\_\_\_

#### Assets and estimated annual rate of return

Cash/Cash equivalents: \$ \_\_\_\_\_ % return: \_\_\_\_\_

Personal residence: \$ \_\_\_\_\_ % return: \_\_\_\_\_

Other real estate: \$ \_\_\_\_\_ % return: \_\_\_\_\_

Business interests: \$ \_\_\_\_\_ % return: \_\_\_\_\_

Other: \$ \_\_\_\_\_ % return: \_\_\_\_\_

Total net worth: \$ \_\_\_\_\_

### Life Insurance Information

Reasons for buying this life insurance: \_\_\_\_\_

Desired face amount: \$ \_\_\_\_\_

How was that face amount determined? \_\_\_\_\_

Who recommended that face amount? \_\_\_\_\_

Health issues: \_\_\_\_\_

Expected rating class: \_\_\_\_\_

#### Current in-force life insurance

Face amount: \$ \_\_\_\_\_ Carrier: \_\_\_\_\_

#### Last time client went through underwriting

Date: \_\_\_\_\_ Face amount: \$ \_\_\_\_\_

Carrier: \_\_\_\_\_

Results: \_\_\_\_\_

Health issues uncovered: \_\_\_\_\_

# PREMIUM FINANCING FACT FINDING WORKSHEET

## Premium Finance Information

Reasons client wants to finance premiums: \_\_\_\_\_

Assets to be used to collateralize premium financing loan: \_\_\_\_\_

Any known credit issues: \_\_\_\_\_

How is the client planning on making the interest payments on the premium financing loan? \_\_\_\_\_

Will the client still buy the life insurance if they cannot secure premium financing? \_\_\_\_\_

## Personal Advisors

CPA Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Attorney Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Financial Advisor Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Family Member Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Other: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_



Transamerica Life Insurance Company  
Transamerica Financial Life Insurance Company

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