

# Life Settlement Qualifier

Please check appropriate box for questions 1-7.

Add the points for the total score, compare the score with the table below for the Settlement Potential.

1. Insured's age:	Point(s)	Your Score
69 or Less*	1	
70 to 75	2	
76 to 80	3	
81 to 85	4	
86 or Older	5	
<b>2. Insured's gender:</b>		
Female	1	
Male	2	
<b>3. Insured's medical condition:</b>		
Healthy senior*	1	
Minor health problems	2	
Serious health problems	3	
Very serious illness	4	
<b>4. Policy type:</b>		
Whole Life	1	
Survivorship	2	
Term Life	3	
Universal Life	4	
Survivorship with one deceased	4	
<b>5. Does the policy have a loan?</b>		
Yes	1	
No	2	
<b>6. Current cash surrender value % of coverage amount:</b>		
30% or More	1	
20% - 30%	2	
10% - 20%	3	
10% or less	4	
<b>7. Annual premiums % of coverage amount:</b>		
4% or More	1	
3% - 4%	2	
2% - 3%	3	
1% - 2%	4	
Your Total		

CLIENT
POLICY NUMBER
SCORE
DATE SENT TO 1ST LIFE
OFFER AMOUNT

CLIENT ACCEPTED:  YES  NO

## SCORE LIFE SETTLEMENT POTENTIAL

7 **Very unlikely** – Please call to discuss

8-13 **Unlikely** – Please call to discuss

14-19 **Likely** – Please complete application

20-25 **Very Likely** – Please complete application



### First National Life Settlements

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\*Checking both asterisks may automatically disqualify the case.