

INFORMATION REQUEST INSTRUCTIONS

THE FLORIDA BAR MEMBER LIFE INSURANCE RESCUE PROGRAM



1. COMPLETE REQUEST FOR INFORCE ILLUSTRATION FORM

Please complete a separate Inforce Illustration Form for each life insurance Company that you would like us to review. You can list multiple policies from the same Company on each form. Please be sure to list the complete policy numbers.

The form must be signed by the insured and the owner (if owner and insured are not the same).

2. FAX, EMAIL OR MAIL FORMS TO:

Please use this form as a FAX COVER or include if EMAILED or MAILED

Fax to: (904) 396-2091

Name: _____ Date: _____

Attn: Life Insurance Rescue Request

The kit can also be scanned and emailed to ctrefry@memberbenefits.com

Or Mail to:

Program Administrator

BPC Financial

7645 Gate Parkway, Suite 101

Jacksonville, FL 32256

ANY QUESTIONS? CALL 1-800-282-8626 XT. 3231

3.

REQUEST FOR INFORCE ILLUSTRATION FORM

Insurer: _____ Attn: _____

Department/Address: _____

Owner/
Trustee
Authorization

Insured's Name: _____ SSN/Tax ID: _____

Address: _____

City: _____ State: _____ Zip: _____

I authorize your company to release the requested information regarding the following policies:

Has there been a significant change in the insured's health since they last purchased life insurance?

No: Yes: If Yes, Please provide details: _____

Please send requested information as quickly as possible.

Owner/Trustee Signature: _____

Insured Signature: _____ Date: _____

(If Different From Owner)

For Internal
Use Only
To be
completed
by The
Florida Bar
Member
Benefit
Insurance
Programs

Please illustrate the following:

- Current crediting/interest rate with current annual premium
- 1% below current crediting/interest rate with current annual premium
- ___% interest rate with current annual premium for ___ years
- ___% interest rate with \$_____ premium for ___ years
- No additional premiums paid into policy
- Minimum premium required to keep policy inforce to age _____
- Other: _____

Please include current policy summary – including Net Case Surrender Value, loan balance, cost basis, policy date, modal and modal premium.