

# Mortgage Protector<sup>®</sup>

## Client Profile Worksheet

You have several options with Mortgage Protector<sup>®</sup>. Use this worksheet to determine the plan that best suits your family's needs.

Date: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_

Tobacco User:  Yes  No If yes, what type? \_\_\_\_\_

Co-Borrower (Other Insured): \_\_\_\_\_ Age: \_\_\_\_\_

Tobacco User:  Yes  No If yes, what type? \_\_\_\_\_

Mortgage Amount \$ \_\_\_\_\_ Monthly Mortgage Payment \$ \_\_\_\_\_

Face Amount \$ \_\_\_\_\_ Plan: (check one)  10-Year  15-Year  20-Year  25-Year  30-Year

Return of Premium Rider .....\$ \_\_\_\_\_

Other Insured Term Rider .....\$ \_\_\_\_\_

Disability Income Rider

Occ  Non-Occ .....\$ \_\_\_\_\_

Other Insured Disability Income Rider

Occ  Non-Occ .....\$ \_\_\_\_\_

Waiver of Premium Rider .....\$ \_\_\_\_\_

Accidental Death Benefit Rider .....\$ \_\_\_\_\_

Children Term Rider .....\$ \_\_\_\_\_

Premium\*: Monthly \$ \_\_\_\_\_ Annual \$ \_\_\_\_\_

If you pay your premium in semi-annual, quarterly or monthly payments, the total annual cost will be higher than the annual premium for the policy.

*\*Mortgage Protector<sup>®</sup> Form L-1039-1/07. The premium quoted is not a guaranteed premium. Initial premiums will be determined for a particular applicant during the application and underwriting process and may vary according to health status and age.*

