

POLICY REVIEW IS EASY AS 1, 2, 3...

1. Provide clients with in-force authorization letter from Quality Quote Insurance Solutions.
2. Fax signed authorization letter to QQIS.
3. Receive in-force illustrations and guidance about current policy information from QQIS.

For more information, please contact Quality Quote Insurance Solutions at (844) TRY-QQIS

WWW.QUALITYQUOTESOLUTIONS.COM



425 California St | Suite 400 | San Francisco, CA 94104
12819 SE 38th Street | Suite 579 | Bellevue, WA 98006



844.TRY.QQIS
844.TRY.QQIS (Fax)

ADVISOR INFORMATION

Name _____

Phone Number _____ Email Address _____

CLIENT/POLICY INFORMATION

(If there is more than one policy, you must fill out additional copies of this form with the other policy's relevant information)

First Insured Name _____ Date of Birth _____

Second Insured Name _____ Date of Birth _____

Policy Number _____ Policy Type _____

Carrier Company _____ Policy Date _____

ORIGINAL POLICY DESIGN

Premium: Pay \$ _____ for _____ years Outcome-----at age 100

Interest Rate Assumption in original illustration Policy Purpose: _____

IN-FORCE ILLUSTRATION DESIGN

- Use original policy design (see above)
- Change policy design
 - Guaranteed premium solve
 - Pay premium for _____ years to solve for _____ at age 100
 - Premium solve
 - Pay premium for _____ years to solve for _____ at age 100
 - Pay premium for _____ years to solve for _____ at age 100
- Other _____

Please submit a copy of the in-force ledger along with any other pertinent information. Please provide the signed agent authorization letter along with this form.

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THE CONCEPT OF POLICY REVIEW

When your clients purchased their life insurance policy, they invested in a financial plan to last a lifetime. However, the strength and performance of their life insurance policy may have changed over the years, as have their needs. Many older policies issued prior to 2001 are not cost effective given recent improvements to products and pricing.

Their life insurance policy should be reviewed periodically to ascertain whether it is meeting their expectations. This is an excellent opportunity to review their existing policies. Quality Quote Insurance Solutions can assist the financial advisor in providing clients with an analysis of their existing coverage, including how their policy is performing, a cost comparison, and options they have within their policy.

In addition, this will give the advisor an opportunity to explore their clients' insurance needs to assure that they are not under or over-insured. Simply have your client fax or email their most recent life insurance statement. In addition, have them sign an authorization allowing a review of their policy and contact QQIS' Sales Desk.

We will coordinate the reviews with our planning department.

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QUALITY QUOTE INSURANCE SOLUTIONS – AUTHORIZATION FORM

Insurance Company: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Re: Policy # (s): _____

Insured: _____

Owner: _____

** Please accept this letter as authorization for the below named agent(s) or agency(ies) to be provided with pertinent information regarding the above policy(ies). This information may include copies of my most recent statements as well as in-force ledgers as needed in order to analyze my policy.

Agent Name(s): _____

Agency:

Quality Quote Insurance Solutions
425 California Street, #400
San Francisco, CA 94104
www.qualityquotesolutions.com

Authorization

I authorize the above named agent(s) and/or agency(ies) to obtain information, including any statements and in-force ledgers needed, to provide me with a current review of the above listed policy(ies).

Printed Name of Insured

Date

Signature of Insured

Date

**For Internal Use Only. Please remit completed form to QQIS Life Sales*

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