NORTHSTAR
BROKERAGE OF PALM BEACH LLC.

PERSONALIZED PRESENTATION REQUEST

Proposed Insured's Full Name: _______________________________________ Date of Birth: _____________________ Sex: _____

Address (es): _________________________State of Residency: ____Phone # (s): ___________________Email:________________

Occupation: _____________Tobacco Use: ________Marital Status: ___________Name & Age of Spouse/Partner: _______________

Name, Sex, & Age of Children: ____

Name, Sex, & Age of Grandchildren: ____

CURRENT LIFE INSURANCE COVERAGE:

Face Amount: _______________________ Cash Value: _______________________Total Annual Cost: ______________________

INSURABILITY STATUS:

Have you ever been denied insurance or been rated below standard? YES* NO

Have you had any disorder of the heart, cancer, or any other condition in the past 3 years? YES* NO

*If yes, please explain: ____

FINANCIAL INFORMATION:

	ESTIMATED CURRENT YEAR	PAST YEAR		ESTIMATED CURRENT YEAR	PAST YEAR
ANNUAL INCOME			**ASSETS**		
Total Earned Income	$	$	Real Estate	$	$
			Stocks, Bonds, & Cash	$	$
Unearned Income	$	$	Business Equity	$	$
Dividends & Interest	$	$	Other	$	$
Net Real Estate Income	$	$	**TOTAL ASSETS**	$	$
Net Business Income	$	$			
Other:	$	$	**LIBABILITIES**		
Total Unearned Income	$	$	Mortgages	$	$
			Business	$	$
TOTAL ANNUAL INCOME	$	$	All Other Personal	$	$
			TOTAL LIABILITIES	$	$

Estimated Net Worth $__________________________

At this time do you have an undischarged bankruptcy? YES NO

Do you have a prepared financial statement? YES* NO
*If yes, please attach a copy.

ADVISORS TO RECEIVE THE "PERSONALIZED PRESENTATION":

Attorney:

Name: ___________________ Email: ___________________Phone #: __________________ Address: _____________________

CPA:

Name: ___________________ Email: ___________________Phone #: __________________ Address: _____________________

It is represented that the statements and answers given are true, complete and correctly recorded to the best of my knowledge and belief. It is agreed that this supplement shall be the basis for any life insurance policy issued.

Client acknowledges that Northstar Brokerage of Palm Beach LLC. and its agents do not act as a lender, or loan broker, and further acknowledges that Northstar Brokerage of Palm Beach LLC. and its agents do not provide lending, tax, or legal advice and the client has opportunity to consult with counsel on all aspects of the contemplated transaction to determine if appropriate given the client's unique financial circumstances, time horizon, risk tolerance, and goals. Life Finance Transactions are generally only appropriate for sophisticated high-net-worth clients.

Signed in ________________________on_________________, ________________

____
Proposed Insured