Request for Illustration – Simplified Planned Giving

1. Client Information

Name	....	....
Date of Birth	....	....
Address	....	....
City	....	....
State, ZIP Code	....	....

2. Asset Information

	Annuity		Other Asset(s) (Cash, stocks, bonds, etc.)
Company	....	Type of Asset	....
Fixed or variable	....	Where/how is it held?	....
Guaranteed rate of return	....	Current rate of return	....
Accumulation value	....	Current market value	....
Surrender value	....	Current net value	....
Cost basis	....	Cost basis	....
Income taken (if any)	....	Income taken (if any)	....

For the most accurate illustration, please provide an account statement and/or other pertinent documentation. For annuities, please provide a copy of contract face page, surrender table, and/or most current statement.

3. Illustration Assumptions

When information regarding real tax rates is not available for a client, we use the assumed tax rates below. If you would like to have an illustration with rates other than those listed, please specify the desired rate(s) below.

Income tax rate	27.0%	....
Estate tax rate	37.0%	....
IRD (Income in respect of a decedent)	39.1%	....

4. Client Objectives

Please provide information regarding the client's objectives for the assets listed. Include an additional sheet if needed.

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Charitable causes / charities client would like to support: ....

....

Wealth replacement option:

Amount to replace tax-free to heirs (death benefit): ....

Annual gift needed to provide benefit (premium): ....

5. Advisor Information

Name.. Phone .... Email ....

If you would like to submit this form and you have your email program running (such as Outlook or Outlook Express), you may click on the submit button, and then send the email that is generated. If you use an online email program, such as Hotmail or Yahoo, you can save this form, and then attach it to an email. Otherwise, you can print the form for mailing or faxing.

www.spgnetwork.com
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