

LENDING FEATURES

FOR
INSURERS

PRODUCT SELLING TYPES

<input type="checkbox"/> LONG TERM CARE	<input type="checkbox"/> MEDICARE SUPPLEMENT	<input type="checkbox"/> WHOLE-LIFE INSURANCE
<input type="checkbox"/> TERM-LIFE INSURANCE	<input type="checkbox"/> FINAL EXPENSE	
<input type="checkbox"/> DISABILITY INCOME	<input type="checkbox"/> CRITICAL ILLNESS	
<input type="checkbox"/> ACCIDENT PLANS	<input type="checkbox"/> OTHER	

AGENCY USE OF FUNDS

<input type="checkbox"/> GROWTH CAPITAL	<input type="checkbox"/> ACQUISITION BOOK	<input type="checkbox"/> RESTRUCTURING
<input type="checkbox"/> REFINANCING	<input type="checkbox"/> TURNAROUNDS	
<input type="checkbox"/> RECAPITALIZATION	<input type="checkbox"/> AGENCY ACQUISITION	
<input type="checkbox"/> PARTNER BUYOUT	<input type="checkbox"/> DEBT CONSOLIDATION	<input type="checkbox"/> AGENCY PERPETUATION
<input type="checkbox"/> WORKING CAPITAL	<input type="checkbox"/> BRIDGE LENDING	<input type="checkbox"/> CROSS-COLLATERALIZATION
<input type="checkbox"/> PROPERTY ACQUISITIONS	<input type="checkbox"/> RENTAL PORTFOLIOS	<input type="checkbox"/> INCOME GROWTH OPPORTUNITIES (IGO'S)
<input type="checkbox"/> IGO'S →	<input type="checkbox"/> DEFERRED FIXED ANNUITIES	<input type="checkbox"/> SPIAs-DIAs-MYGAs-QLACs

REQUIRED DOCUMENTATION

☐ LEGAL ENTITY		☐ LOAN AMOUNT	
☐ EXISTING BUSINESS DEBT		☐ ANNUAL COMMISSIONS	
☐ OWNERS CREDIT SCORE		☐ LIST OF OFFICERS	
☐ ADDRESS	☐ CITY	☐ STATE	☐ ZIP CODE
☐ DIRIVERS'S LICENSE	☐ PASSPORT	☐ IDENTIFICATION NUMBER	
☐ OPERATING AGREEMENT	☐ PROOF OF E&O INSURANCE	☐ 2 YEARS FULL TAX RETURNS	
☐ 3 MONTHS-BUSINESS BANK STATEMENTS	☐ BUSINESS DEBTOR LIST	☐ DEBTOR PAYOFF SCHEDULE	
☐ BOOK HISTORY	☐ CARRIER	☐ CONTRACTS	
☐ BUSINESS FINANCIALS →	☐ BALANCE SHEET TWO YEARS	☐ P & L STATEMENT TWO YEARS	