

## Life Insurance Policies and Annuities

Policy number and company \_\_\_\_\_

Type\* \_\_\_\_\_ Insured \_\_\_\_\_

Owner \_\_\_\_\_ Date of Purchase \_\_\_\_\_

Primary beneficiary \_\_\_\_\_ Contingent beneficiary \_\_\_\_\_

Who pays premium† \_\_\_\_\_ Cash value \_\_\_\_\_

Amount of loans on policy \_\_\_\_\_ Face amount or death value \_\_\_\_\_

\*Term, whole life, split dollar, group life, annuity.

†Corporation (C).

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