



Fact Finder: Corporate Split Dollar

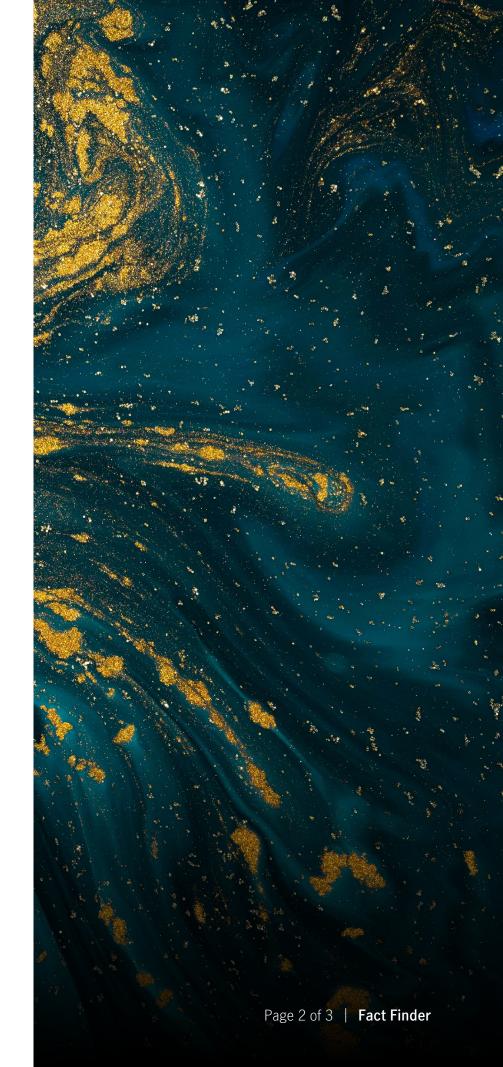
Business information	Financial professional	
Business name:	Name:	
State of incorporation:	Company:	
Employer tax rate: %	Address:	
☐ Publicly traded ☐ Nonprofit	Phone:	
	Email:	
Employee information		
Name:	Product information	
Age/DOB:	□ UL	
Risk class assumed:*	☐ IUL crediting rate:	
Employee salary: \$	☐ VUL crediting rate:	
Employee tax rate: %	Death benefit (if specified):	
Spouse name:	Premium amount (if specified):	
Spouse age/DOB:	Years to pay:	
Spouse risk class assumed:*	1035 Exchange: ☐ No ☐ Yes	
State:	If yes, amount:	
State of issue (if different):	Vitality: □ No □ Yes	
Retirement year/age:	Policy distributions after loan repayment?	
	□ No □ Yes Years:	



*Risk class options

- Super Preferred Non-Smoker (SPNS)
- Preferred Non-Smoker (PNS)
- Standard Plus Non-Smoker (StdPNS)
- Standard Non-Smoker (StdNS)
- Preferred Smoker (PS)
- Standard Smoker (SS)

1: Split dollar arrangement design	2: Economic benefit/interest rates	
□ Endorsement split dollar (ESD)	□ Economic benefit rates (ESD & NECASD)	
□ Death benefit amount to business	☐ Alternative term rates	
□ Premium	☐ Table 2001 rates	
☐ Greater of premium or cash surrender value	Survivorship	
☐ Residual (balance after employee share)	☐ Table 2001 (alternate rates at first death)	
☐ Specified number of years:	☐ Table 2001 (all years)	
☐ Preliminary funding account (PFA)	☐ AFR interest rate (LRSD & switch dollar)	
□ Death benefit amount to employee	☐ Specified rate: %	
☐ Residual (balance after business share)	☐ Schedule (include details below)	
☐ Salary multiple:		
☐ Total compensation multiple:		
☐ Specified amount: \$	☐ Varying incrementally	
☐ Non-equity collateral assignment split dollar (NECASD)	Start rate: %	
\square Switch to loan regime (switch dollar) \square No \square Yes	Increment: %	
□ Loan regime split dollar (LRSD)	Cycle minimum rate: %	
Loan regime spire donar (LNOD)	Cycle maximum rate: %	
	☐ Bonus option for tax on economic benefit/interest	
	□ None □ Single □ Double	



3: Split dollar arrangement termination (rollout) options

Taxation funding

☐ Employer bonus

☐ Cash ☐ Withdrawal ☐ Loan

☐ Single ☐ Double

☐ Specified amount: \$

Endorsement split dollar (ESD)	Non-equity collateral assignment	Loan regime split dollar (LRSD)
☐ None (split dollar for lifetime)	split dollar (NECASD)	☐ None (split dollar for lifetime)
	□ None (split dollar for lifetime)	
□ Employer will keep policyTermination year	☐ Full rollout	☐ Installment payments Termination year:
☐ Executive bonus	Termination year	Number of loan repayments:
Termination year Taxation funding	☐ Release assignment Release year	Repayment funding ☐ Cash ☐ Withdrawal ☐ Loan ————————————————————————————————————
☐ Cash☐ Withdrawal☐ Loan☐ Employer bonus	Taxation funding ☐ Cash ☐ Withdrawal ☐ Loan	☐ Release assignment Release year
☐ Single ☐ Double☐ Specified amount: \$	☐ Employer bonus ☐ Single ☐ Double	Taxation funding ☐ Cash ☐ Withdrawal ☐ Loan
☐ Employer bonus additional premium☐ Single ☐ Double	☐ Specified amount: \$	☐ Employer bonus☐ Single ☐ Double☐ Specified amount: \$
☐ Executive bonus after employer recovery		Specified affiliation. φ
Termination year		
Employer recovery amount ☐ Premium paid ☐ Specified amount: \$		

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