



Leisure Werden and Terry
Pasadena San Francisco Denver
lwtbrokerage@lwtagency.com

Request for In-Force Policy Illustration

Policy Information

Policy Number: _____ Date: _____

Insurance Company: _____

Insured: _____

Policy Owner: _____

SSN or Tax ID of Owner: _____

Request

Please provide the following:

- Inforce Illustration at Current Premium
- Inforce Illustration- min premium to endow
- Policy Cost Basis
- Other: _____

Signatures

Policy Owner/Trustee *Date*

Policy Owner/Trustee *Date*

Policy Owner Address

Street Address

City *State* *ZIP*

Please forward the completed request form to the above email address or to your LWT Sales Representative