

STRATEGIC LIFE INSURANCE ANALYSIS

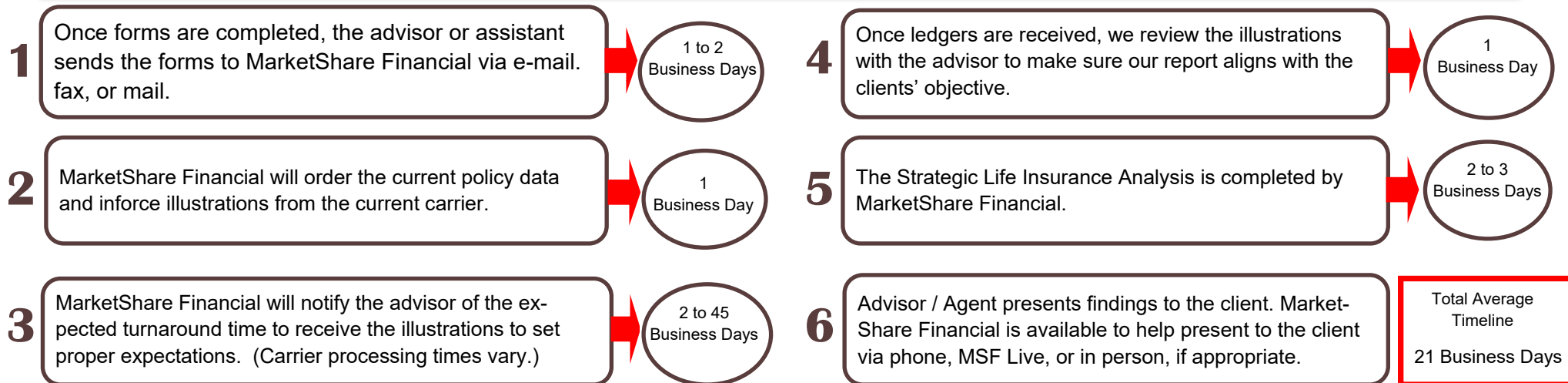
REQUIRED INFORMATION & PROCESS

Designed for cases of \$5000 and up of annual premium and/or \$25,000 rollover.

REQUIRED INFORMATION FROM ADVISOR/AGENT

- * **Complete client discovery to determine overall objective of coverage, premium budget & general medical information.**
- * **MarketShare Financial® will provide you with the In-Force Authorization Form for completion and client signature.**

PROCESS & TIMELINE



MarketShare
Financial

Please contact your **MarketShare Marketing Team** for additional information.

800.421.8260