

Legacy IRA Strategy Fact Finder

Product

(select one) ☐ FlexLife IUL ☐ SummitLife IUL (min DB \$1M) ☐ SurvivorLife SIUL

State of Issue: _____ ☐ LSW or ☐ NLIC

Insured Information

Client Name: _____ Gender: ☐ Male ☐ Female

DOB: ____/____/____ Age at Death: _____

Second Insured (SIUL only): _____ Gender: ☐ Male ☐ Female

DOB: ____/____/____ Age at Death: _____

Account Information

Account Type: ☐ IRA ☐ 401(k)/403(b)/457 ☐ Other _____

Current Value: \$ _____ Years to Spend Down: _____

Pre-Tax Growth Rate %:* _____ After-Tax Growth Rate %:* _____

Owner Income Tax Rate %:* _____ Beneficiary Income Tax Rate %:* _____

Beneficiary Information

Name: _____ Age: _____ Name: _____ Age: _____

Name: _____ Age: _____ Name: _____ Age: _____

Agent Information

Name: _____ NLG Life Agent ID: _____

Agency Name: _____

Phone: _____ Email: _____

Additional Information

- All life illustrations will be run using the default crediting strategy at the current average annual return rate.
- Death benefit (DB) for all illustrations will be solved based on cash value, using the after-tax annual distribution amount for the number of years specified and assume an increasing death benefit during premium paying years. Assumes DB is only needed for legacy/estate and not for survivor/retirement needs. If minimum DB is needed, note that in Additional Information.
- All illustrations will assume a Standard Non-tobacco rating unless otherwise specified.

Send completed Fact Finders to: AMarkets@NationalLife.com

*Client's assumed rates

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