



North American's Business Solutions

Executive Bonus Client Worksheet

BUSINESS INFORMATION

Business Name: _____

Address: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Accountant: _____

Accountant Phone: _____

Attorney: _____

Attorney Phone: _____

Business Tax Bracket: _____

Is the business value expected to change? Yes No

Details: _____

EXECUTIVE INFORMATION

Name: _____

Title/Position within company: _____

Date of birth: _____

Underwriting class: _____

Executive Tax Bracket: _____

Planned retirement age: _____

Notes: _____

Type of Insurance	Indexed Universal Life	Universal Life	Term
Product Name			

Desired Death Benefit Amount	Level or Increasing	Annual Premium	Length (or until age ____)
\$			

Type of Plan	Single Bonus	Double Bonus	Other

Bonus Paid Until	Retirement (Estimated Date)	Date (MM/YYYY)	Age

Targeted Cash Flow for Employee at Retirement	Projected Retirement Age	Target Annual Cash Flow	Duration of Retirement Income

Notes: _____
