

Atlantic Financial

Name of Insured: _____ Date of Birth: ____/____/____ Sex: Male Female

Insurance Company: _____ Policy Number: _____ Policy Date: ____/____/____

Death Benefit Amount: \$ _____ Premiums Paid to Date: \$ _____

Name of Initial Policyowner (at time of policy issuance) _____

Name of Initial beneficiaries (at time of policy issuance) _____

Name of current policyowner (if different than question #) _____

Name of current beneficiaries (if different than question #) _____

What was the insured's and policyowner's original purpose for buying the policy? Please explain in detail. Explanations such as "estate planning" should be expanded upon: _____

Before or at the time of the policy was issued, did the insured, policyowner or any other party arrange to transfer, sell or assign, directly or indirectly the policy or any benefits to a third party? Yes No

If Yes, please describe the arrangements in detail and provide copies of any documents relating to the arrangement: _____

Has the insured or policyowner ever assigned the policy or policy benefits to any person or entity? Yes No

If yes, please describe the details of such assignment: _____

Has the policy or any of the policy premiums been financed by a third party, either through a loan, equity, contribution or otherwise? Yes No

If yes, please describe the financing arrangements in detail and provide copies of any documents referred to that arrangement: _____

If yes, what is the name of the lender: _____

If yes, what is the principal loan amount: _____

If yes, what is the loan maturity balance (payoff amount) \$ _____

If yes, what is the loan maturity date: _____

List all persons or entities (including any trust) who have or who have even had any direct or indirect ownership or other interest in the policy or its proceeds: _____

Please describe in detail the nature of the interest: _____

Please describe in detail, the dates and circumstances by which the interest was obtained: _____

Please described in detail, the person's or entity's relationship to the insured: _____

For each entity identified in response to this response to this question, please identify all persons or entities that own and, if different, control or manage, or have owned controlled or managed that entity. If any entity is a trust, please identify all past and present beneficiaries of such trust. _____

Has the policy's beneficiary changed since the policy was issued Yes No

If yes, who was the beneficiary at the time the policy was issued: _____

If yes, what was their relationship to the insured: _____

If yes, why was the beneficiary changed: _____

If yes, who is the current beneficiary and what is the beneficiary's relationship to the insured: _____

Has the insured or policyowner borrowed money directly or indirectly in connection with the policy: Yes No

If yes, please describe the borrowing arrangement in detail and provide copies of any documents relating to that arrangement: _____

Are any of the interests of the policyowner in the policy pledged as security to any person or entity or otherwise encumbered or restricted in anyway: Yes No

If yes, please describe the option in detail and provide copies of any documents relating to that option: _____

Does the policyowner or insured have knowledge of any information that may be used by the issuing insurance carrier to challenge the payment of the policy's death benefit, including whether the policyowner at the time of the policy issuance had an insurable interest in the life of the insured: Yes No

If yes, please explain in detail: _____

Name of Insured Signature of Insured Date

Name of Second Insured(if applicable) Signature of Second Insured (if applicable) Date

Name of Policyowner Signature of Policyowner Date

Name of Agent Signature of Agent Date