

Insurance Summary

Prepared for Paul and Lynn Price

The Insurance Summary report lists your insurance policies including life, long term care, disability income, business disability, property/casualty, and medical.

INSURANCE, LIFE

Lynn's Whole Life

Death Benefit: \$50,000
 Insured: Lynn Price
 Annual Premium: 500

Institution:
 Owner: Lynn Price
 Cash Value: \$5,000 as of 11/5/2014 8:03 AM

Primary Beneficiaries

Paul Price (100.00%)

Contingent Beneficiaries

Equally to Children (100.00%)

Paul's Term

Death Benefit: \$750,000
 Insured: Paul Price
 Annual Premium: 500

Institution:
 Owner: Paul Price

Primary Beneficiaries

Lynn Price (100.00%)

Contingent Beneficiaries

Equally to Children (100.00%)

Paul's Whole Life

Death Benefit: \$1,000,000
 Insured: Paul Price
 Annual Premium: 1,500

Institution:
 Owner: Paul Price
 Cash Value: \$55,000 as of 11/5/2014 8:04 AM

Primary Beneficiaries

Lynn Price (100.00%)

Contingent Beneficiaries

Equally to Children (100.00%)

INSURANCE, LONG TERM CARE

Paul's LTC Insurance

Benefit: \$200,000 Annually
 Insured: Paul Price
 Annual Premium: 3,500
 Benefit Period: 5 Years

Institution:
 Owner: Paul Price
 Elimination Period: 0 Days

INSURANCE, DISABILITY

Lynn's Short Term Disability

Benefit: 60% of Lynn's Salary
 Policy Type: Group Short Term
 Owner: Lynn Price
 Maximum Initial Benefit Cap:
 Elimination Period: 0 Days

Institution:
 Insured: Lynn Price
 Annual Premium: \$500
 Maximum Annual Benefit:
 Benefit Period: Age 65

Paul's Long Term Disability

Benefit: 60% of Paul's Salary
Policy Type: Group Short Term
Owner: Paul Price
Maximum Initial Benefit Cap:
Elimination Period: 0 Days

Institution:
Insured: Paul Price
Annual Premium: \$500
Maximum Annual Benefit:
Benefit Period: Age 65

INSURANCE, PROPERTY AND CASUALTY**Homeowner's Insurance**

Insured Asset: Primary Residence
Owner: Paul and Lynn (Joint/ROS)

Institution Name:
Policy Type: Homeowner's

This analysis must be reviewed in conjunction with the limitations and conditions disclosed in the Disclaimer page. Projections are based on assumptions provided by the advisor/representative, and are not guaranteed. Actual results will vary, perhaps to a significant degree. The projected reports are hypothetical in nature and for illustrative purposes only. Return assumptions do not reflect the deduction of any commissions. They will reflect any fees or product charges when entered by the advisor/ representative. Deduction of such charges would result in a lower rate of return. Consult your legal and/or tax advisor before implementing any tax or legal strategies.
