# Universal Life Illustration & Quote Requests

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| --- | --- |
| **Policy Number** | **Policy Owner Name** |
| **Advisor Name** | **Advisor Phone Number** | **Advisor Email Address** |

### Note:

* Due to fund options contained in the plan, there maybe instances where an illustration cannot be provided.
* A “current” rate of return is not a valid option. The minimum we can assume is 0% and the maximum is 8%. For all D2000 policies, the rate of return is set at 4%.
* Some requests including quotes for decreases, smoker changes, loans, and surrendered or lapsed policies, as well as some requests for policies beginning with “000”, D2000 or MetLife policies may be subject to review by our Pricing team, which may result in longer handling times.

## Inforce Illustration Requests - *Select and complete the following:*

[ ]  Illustrate assuming deposits of$  per and an assumed rate of return of .

[ ]  Solve for premium to carry to  with an assumed rate of return of .

[ ]  Solve for how long the policy can remain in force without additional deposits with an assumed rate of return of .

[ ]  Solve for payment duration required to support the policy for life assuming deposits of $  per and assumed rate of return of .

[ ]  Solve for the lump sum deposit required to support the policy for life with the deposit type of  with an assumed rate of return of .

[ ]  Decrease coverage number  by $  on assuming deposits of $  per and an assumed rate of return of **.**

[ ]  Change Death Benefit Option from: to assuming deposits of $  per  and an assumed rate of return of .

[ ]  Delete coverage number on the next monthiversary assuming deposits of $  per and an assumed rate of return of .

[ ]  Change Cost of Insurance Option from: to assuming deposits of $  per and an assumed rate of return of .

***\*\*Level COI is not available on Equitable Generations, Juvenile, D2000, or MetLife policies\*\****

General Changes- *Select and complete the following:*

[ ]  Rider Change , **,**

[ ]  Rating Change to  % on

[ ]  Smoker status change on to

Special Instructions:

**To have request submitted, send request to** **inforcelifemail@equitable.ca**

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