



EVANS & DAVIS

Home Office:
211 N Broadway
Edmond, OK 73034
Phone (866) 708-2335
Fax (405) 286-2770
attorneys@evansdavis.com

ATTN: _____

PLEASE EMAIL OR FAX RESPONSE TO: attorneys@evansdavis.com, (405) 286-2770

TO: _____

COMPANY: _____

PHONE: _____

FAX: _____

DATE: _____

Illustration and Policy Information Request Attached signed by owner

Policy _____ Insured _____

Policy _____ Insured _____

Policy _____ Insured _____

Policy _____ Insured _____

Policy _____ Insured _____

TOTAL NUMBER OF PAGES: _____

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EVANS & DAVIS

IN-FORCE LEDGER REQUEST

To: Policy Services/Customer Service Department

Insurance Company Name: _____ Policy # _____

Insured Name(s): _____ DOB: _____ Last 4 digits of SSN: _____

Policy Owner Name(s): _____

Policy Owner Address: _____

Dear Policy Services:

As the owner of the above referenced policy, I hereby request you to provide my estate planning attorney with any and all information about my life insurance policies. For the initial review please provide the following in-force ledger(s) with the understanding that additional in-force ledgers may be required:

- Original "as sold" illustration
- Illustration based upon values and premiums schedule
- Illustration based upon current proceeds, showing minimum premiums required to maintain my policy in-force to policy maturity under policy's guaranteed assumptions
- Illustration based upon current proceeds, showing minimum premiums required to maintain my policy in-force to policy maturity under current cost assumptions and interest/dividend assumptions
- Please use gross hypothetical rate of return of 4%
- Illustration based upon guaranteed interest rates
- Other: _____

In addition to the above information, please provide policy's income tax basis.

We would also like to confirm the **OWNER, BENEFICIARY, PAYER** and **APPLICANT** for **EACH** policy. Please send the requested information to the following via email or fax.

Evans & Davis PLLC
211 N Broadway
Edmond, OK 73034

EMAIL: attorneys@evansdavis.com FAX: (405) 286-2770

If you are unable to send this information to Evans & Davis on my behalf, please forward it directly to my address of record.

Owner's Signature: _____ Date: _____

Owner's Signature: _____ Date: _____