



# Internal Pricing Analysis Request Form

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## Instructions

- 1 Complete this pricing request form with the most current information available.
- 2 Submit an inforce maturity illustration dated within 90 days with level premiums, a level net death benefit, and leaving \$100 at the end of the illustrated run.
- 3 Click submit and attach the illustration or e-mail pricing@welcomefunds.com.

**Submit Via E-mail**

The data provided below will enable Welcome Funds to evaluate the qualification status of a life insurance policy and determine if a case is a viable candidate for the life settlement option. Our internal pricing analysis includes hypothetical mortality assumptions, multiple probabilistic-based policy valuations and case specific market factors.

## Case Information

<b>Producer Name</b>		<b>Producer Phone/E-mail</b>		<b>WFI Rep</b>		<b>Date</b>		
<b>Insured(s) Name</b> (Not Required)			<b>Insured 1 Gender</b> M   F		<b>Insured 1 D.O.B.</b>		<b>Insured 2 Gender</b> M   F	
<b>Tobacco Use</b> M   F   Both		<b>Reason for Sale</b>			<b>Have LE's been completed on the insured(s)?</b> Y   N If so, please obtain a copy of <b><i>all</i></b> reports and summarize below			
<b>1<sup>st</sup> Insured Primary Diagnosis</b>			<b>1<sup>st</sup> Insured Other Conditions</b>					
<b>2<sup>nd</sup> Insured Primary Diagnosis</b>			<b>2<sup>nd</sup> Insured Other Conditions</b>					

## Life Expectancies

Insured	Company	Cert. Date	M. Mult.	LE (mos.)	Primary Diag.

## Policy Information

<b>Policy Values as of Date</b>		<b>Owner State</b>		<b>Insurance Carrier</b>		<b>Policy Type</b>	
<b>Policy Number</b>	<b>Policy Issue Date</b>		<b>Face Value</b>		<b>Account Value</b>		<b>Cash Surrender Value</b>
<b>Loan Amount</b>	<b>Premiums to Maturity</b>		<b>Target Bid</b> (optional)		<b>Premium Financed</b> Y   N		<b>Financed By</b>

The internal pricing analysis is for illustrative purposes only and is not a contract, prediction of bids, offer to purchase a policy, or a solicitation to buy or sell a security. Actual life settlement market bidding results may be more or less favorable than those illustrated. Market conditions vary and the analysis is not intended to replace the actual submission of a policy to the market.