

Premium financing pre-application request

Please complete this pre-application in full and with all required documents

Required pre-screen documents

- [Cover letter including rollout plan](#)
- Policy illustration
- Master copy of Errors and Omissions coverage

Additional documents that may be required during the pre-screen process or underwriting

- Loan term sheet
- Trust documents
- Third party financial statements
- Other documents related to the submission

Proposed borrower's name: _____

Proposed borrower's income: _____

Proposed borrower's net worth: _____

Proposed borrower's liquid net worth: _____

Proposed insured's name: _____

Proposed insured's net worth: _____

Proposed insured's birth date: ____ / ____ / ____

Proposed owner's name: _____

What is the purpose of the insurance being applied for?

Why is premium financing suitable for the proposed insured?

Will the financed policy or financing arrangement employ any of the following strategies (check all that apply)?

Bond financing Split dollar 1035 premium

Are there any other active or pending premium finance policies associated with this client? Yes No

If yes, please provide the annual premium amount being borrowed and the expected total loan balance directly prior to the anticipated roll-out.

Is this policy a replacement? Yes No

If yes, please describe the reason for replacement and provide an inforce illustration of that policy:

Is the policy being replaced premium financed? Yes No

Who is the proposed lender? _____

How are the interest payments paid? Out of Pocket Accrued Both

If both, please describe.

Describe the collateral, in addition to the life insurance policy, used for the premium financing transaction:

Applicant's financial professionals

Representative(s) and compensation split: _____

BGA/IMO/BD: _____

BGA/IMO/BD contact: _____ BGA/IMO/BD contact email: _____

Attorney: _____ Phone # and contact: _____

Tax professional: _____ Phone # and contact: _____

Email documents to:

advancedsales@securian.com



Questions about Premium Financing?

Contact Advanced Sales: **1-888-413-7860, Option 3**
advancedsales@securian.com



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