

Life Insurance Summary

Prepared for Paul and Lynn Price

This report lists your life insurance policies and shows the amount of coverage for each person insured.

Insured: Paul Price

Paul's Term

Death Benefit: \$750,000	Institution:	Policy Number:
Purchase Date: 9/25/2000	Type: Term	Insured: Paul Price
Owner: Paul Price	Premium Payer: Paul and Lynn (Joint/ROS)	Annual Premium: \$500
Term (years): 20	Premium Term (years): Lifetime	Exclusion Amount: \$0
Proceeds Reinvested: Inflation (3.76%)		

Primary Beneficiaries:

Lynn Price (100.00%)

Contingent Beneficiaries:

Michael Price (50.00%) Stacy Price (50.00%)

Paul's Whole Life

Death Benefit: \$1,000,000	Institution:	Policy Number:
Purchase Date: 11/5/2014	Type: Whole	Insured: Paul Price
Owner: Paul Price	Premium Payer: Paul and Lynn (Joint/ROS)	Annual Premium: \$1,500
Term (years): n/a	Premium Term (years): Lifetime	Exclusion Amount: \$0
Cash Value: \$55,000 as of 11/5/2014	Basis: \$0	Cash Value Growth Rate: Inflation (3.76%)

Proceeds Reinvested: Inflation
(3.76%)

Primary Beneficiaries:

Lynn Price (100.00%)

Contingent Beneficiaries:

Michael Price (50.00%) Stacy Price (50.00%)

Insured: Lynn Price

Lynn's Whole Life

Death Benefit: \$50,000	Institution:	Policy Number:
Purchase Date: 11/5/2014	Type: Whole	Insured: Lynn Price
Owner: Lynn Price	Premium Payer: Paul and Lynn (Joint/ROS)	Annual Premium: \$500
Term (years): n/a	Premium Term (years): Lifetime	Exclusion Amount: \$0
Cash Value: \$5,000 as of 11/5/2014	Basis: \$0	Cash Value Growth Rate: Inflation (3.76%)

Proceeds Reinvested: Inflation
(3.76%)

Primary Beneficiaries:

Paul Price (100.00%)

Contingent Beneficiaries:

Michael Price (50.00%) Stacy Price (50.00%)

Total Insurance				
Insured	Payable to Spouse or Estate	Payable to Irrevocable Trust	Payable to Heirs	Total Benefit
Paul Price	\$1,750,000	\$0	\$0	\$1,750,000
Lynn Price	\$50,000	\$0	\$0	\$50,000
Survivorship	\$0	\$0	\$0	\$0
Total Insurance Coverage	\$1,800,000	\$0	\$0	\$1,800,000

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