

**INSURANCE TYPES / CLIENT OBJECTIVES**

	[Select all that apply.]	Term	ROP Term	Fixed Universal Life	Index Universal Life	Variable Universal Life	Whole Life	Life with LTC	Single Premium Life	Long Term Care (Traditional)	Annuity Fixed or Index	Annuity Variable	Annuity Immediate
1	Temporary Protection 10-, 15-, 20-, 25-, 30-Years	0											
2	Temporary Protection 15-, 20-, 30-Years	0	0										
3	Death Benefit Only, No Cash Value	0	0										
4	Lowest Premium	0	0										
5	Permanent Protection			0	0	0	0	0	0	0			
6	Policy Cash Value			0	0	0	0	0	0	0	0	0	0
7	Tax Sheltered Access to Cash Prior to Age 59 1/2			0	0	0	0	0	0	0	0	0	0
8	Flexible to Meet Changing Needs				0	0					0	0	
9	Cash Accumulation Account with investment or interest rate mix selection by client				0	0					0	0	
10	Low to Moderate Risk Tolerance			0	0	0	0	0	0	0	0	0	0
11	High to Moderate Risk Tolerance	0	0			0							
12	Increasing Death Benefit Without Insurability Concern			0	0	0	0				0	0	
13	Flexible Premium Payments			0	0	0					0	0	
14	Estate Liquidity	0	0	0	0	0	0	0	0	0	0	0	
15	Long Term Care / Convalescent / Nursing									0	0	0	
16	Income Tax Free Death Benefit	0	0	0	0	0	0	0	0				
17	Age 0 - 18			0	0	0	0	0	0		0	0	0
	Age 19 - 35	0	0	0	0	0	0	0	0		0	0	0
	Age 36 - 45	0	0	0	0	0	0	0	0		0	0	0
	Age 46 - 55	0	0	0	0	0	0	0	0		0	0	0
	Age 56 - 65	0	0	0	0	0	0	0	0		0	0	0
	Age 66 - 70	0	0	0	0	0	0	0	0		0	0	0
	Age 71 - 80	0	0	0	0	0	0	0	0		0	0	0
	Age 81 - 85	0	0	0	0	0	0	0	0		0	0	0
<b>TOTALS</b>													

**FOR AGENT USE ONLY**  
**Fill in all selections that apply to client's objectives. Total each column for the number of entries selected in that column. Columns with higher totals are the Insurance Products to focus on for client.**  
 Please review policy-specific features, definitions and limitations, applicable for the State of issue. Life and annuity products vary by State and insurance company. Please contact Integrity 212-868-3850.