



LIFE INSURANCE

FACT FINDER

Advanced Markets

Estate Planning Fact Finder



LIFE INSURANCE

ESTATE PLANNING

Advanced Markets

Estate Planning

Fact Finder — Short Form

Date: _____

Client Information (Client A)

First Name: _____

Last Name: _____

Gender: _____ DOB/Age: _____

Smoker: Yes No

Underwriting Risk Class* (Legend below): _____

Citizenship: _____

Client Information (Client B)

First Name: _____

Last Name: _____

Gender: _____ DOB/Age: _____

Smoker: Yes No

Underwriting Risk Class* (Legend below): _____

Citizenship: _____

Financial Information

Client A Annual Salary: \$ _____

Client B Annual Salary: \$ _____

Other Income: \$ _____

Total Adjusted Gross Income: \$ _____

Income Tax Bracket: _____ %

Current Estate

Any Wills or Trusts in Place? _____

Number of Annual Exclusions (Beneficiaries): _____

Previous Lifetime Exemption Gifts Made (if any): \$ _____

Existing Assets in Trust?: \$ _____

After-Tax Growth Rate _____ %

*Underwriting Legend: Super Preferred Non Smoker, Preferred Non Smoker, Standard Plus Non Smoker, Standard Non Smoker, Preferred Smoker, Standard Smoker, Uninsurable.

MONTHLY ASSETS & LIABILITIES

Asset Name	Growth Rate	Owner		
		Client	Spouse	Joint
Checking & Savings Accounts (including Money Market Funds and CDs):	%	\$	\$	\$
Bonds & Bond Funds:	%	\$	\$	\$
Stocks & Mutual Funds:	%	\$	\$	\$
Real Estate:	%	\$	\$	\$
Annuities:	%	\$	\$	\$
Business Interests:	%	\$	\$	\$
Miscellaneous (personal property, autos, boats, planes, art, jewelry, collectibles):	%	\$	\$	\$
Retirement Plans (401(k), IRA, etc.):	%	\$	\$	\$
Life Insurance:	%	\$	\$	\$
Total Assets:		\$	\$	\$

Liabilities	Client	Spouse	Joint
Real Estate Mortgages:	\$	\$	\$
Loans:	\$	\$	\$
Other Obligations:	\$	\$	\$
Tax Liabilities:	\$	\$	\$
Total Liabilities:	\$	\$	\$
Net Worth (Total Assets — Total Liabilities):	\$	\$	\$

Comments:

Insurance products are issued by: John Hancock Life Insurance Company (U.S.A.), Boston, MA 02116 (not licensed in New York) and John Hancock Life Insurance Company of New York, Valhalla, NY 10595.

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INSURANCE PRODUCTS:		
Not FDIC Insured	Not Bank Guaranteed	May Lose Value
Not a Deposit	Not Insured by Any Government Agency	