

# IUL (Indexed Universal Life) Qualification & Closing Form

**Total Questions: 22**

1. Full Name

2. Phone Number

3. Full Address (Street Address)

4. City

5. State

6. ZIP Code

7. Date of Birth

8. Gender

Male
Female

9. Marital Status

Single
Married
Divorced

10. Employment Status

Business Owner
Self-Employed
Employed
Retired

11. Annual Income Range

\$50k-\$100k
\$100k-\$250k
\$250k+

12. Existing Life Insurance Coverage?

Yes
No

13. Current Monthly Premium Budget

\$100-\$300
\$300-\$500
\$500+

14. Desired Coverage Amount

\$100k-\$250k
\$250k-\$500k
\$500k+

15. Primary Goal For Coverage

Retirement
Wealth Protection
Tax-Free Growth
Family Protection

16. Beneficiary Information Available?

Yes
No

17. Tobacco / Smoking Status

Smoker
Non-Smoker

18. Any Major Health Conditions?

Yes
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No
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19. Preferred Monthly Payment Method

Bank Draft
Debit Card
Credit Card

20. Preferred Draft Date

1st Week
2nd Week
3rd Week
4th Week

21. Interested in reviewing IUL options today?

Yes
No

22. If a licensed agent shows you a suitable IUL strategy based on your goals and budget, would you be open to moving forward today?

Yes
No