

# Pension maximization strategy using life insurance

## Agent checklist

Use the information below as a guide for your pension maximization cases.

Plan participant's name: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Age at retirement: \_\_\_\_\_

Risk classification: \_\_\_\_\_

Preferred \_\_\_\_\_ Standard \_\_\_\_\_ Rated \_\_\_\_\_ Tobacco \_\_\_\_\_ Non-tobacco \_\_\_\_\_

Name of employer: \_\_\_\_\_

Pension plan options: \_\_\_\_\_

Life only option monthly income amount: \_\_\_\_\_

Joint and survivor option monthly income amount: \_\_\_\_\_

Pension plan inflation adjustment? Yes \_\_\_\_\_ No \_\_\_\_\_ | If yes, what is the percentage amount? \_\_\_\_\_

Present income tax bracket: \_\_\_\_\_

Future income tax bracket: \_\_\_\_\_

Name of participant's spouse: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Notes: \_\_\_\_\_

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**For help putting together your pension maximization cases,  
 contact sales development at 800-800-3656 ext. 10411 or email [salesupport@nacolah.com](mailto:salesupport@nacolah.com).**

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