

Pension maximization strategy using life insurance

Agent checklist



North American Company for Life and Health Insurance®

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: _____

For help putting together your pension maximization cases,
contact sales development at 800-800-3656 Option 2, 1 or email salesupport@nacolah.com.

Neither North American Company for Life and Health Insurance nor its agents give tax advice. Please advise your customers to consult with and rely on a qualified legal or tax advisor before entering into or paying additional premiums with respect to such arrangements.

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