

# Executive Bonus Checklist

Use this checklist when gathering information alongside the client to help the case go through underwriting efficiently. Complete a separate checklist for each person receiving a bonus.

## Questionnaire

Executive Name: \_\_\_\_\_

Percent ownership: \_\_\_\_\_

Title/Position: \_\_\_\_\_

Planned retirement age: \_\_\_\_\_

Age: \_\_\_\_\_

Death Benefit amount: \$ \_\_\_\_\_

Salary: \$ \_\_\_\_\_

### Type of bonus arrangement

- ☐ Standard executive bonus
- ☐ Double bonus

### Bonus payout timeframe

- ☐ Until retirement: \_\_\_\_\_
- ☐ Until date: \_\_\_\_\_
- ☐ Until age: \_\_\_\_\_
- ☐ Other: \_\_\_\_\_

### How was the planned bonus amount and death benefit determined?

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## Next Steps

When ready to proceed, fill out the required business insurance supplement form and submit it along with the completed application.

Including this checklist and a cover letter can also aid the underwriting process.