Questionnaire



North American Company for Life and Health Insurance®

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.

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?	

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.

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