

POLICY EVALUATION PROGRAM

Sample Broker of Record Letter

This letter is to be used to provide your firm with assurance that should you be able to provide a Policyowner with a better option, you will be named "Broker of Record" in any resulting insurance transaction.

(Date)

(Client Name)

(Address 1)

(Address 2)

(City, State, Zip)

Dear (Client Name),

As we previously discussed, I am reviewing your life insurance policy through the Policy Evaluation Program, as a service to you. After reviewing your present situation and analyzing your life insurance needs, I will be providing you with a detailed report on the current status of your life insurance portfolio. That report will show you how your policy has performed and provide you with a framework designed to help maximize the benefit of that policy going forward. As part of this process, we may analyze alternatives or additions to your present coverage.

Please acknowledge below that I will be named as the Broker of Record on any additional or alternate coverage that we agree should be placed.

Sincerely,

(Producer Name)

AUTHORIZATION

I authorize (Producer Name) to become my Broker of Record should additional or alternate coverage be placed.

Signature of Insured

Date

Signature of Policyowner

Date

Printed Name of Insured

Printed Name of Policyowner