BMO Insurance

RESET EMAIL PRINT

BMO Life Assurance Company
60 Yonge Street, Toronto, ON M5E 1H5
1-877-742-5244 • 416-596-4143 Fax

Request for Universal Life In-force Illustration

Note:
- An in-force illustration is not required to process a policy change.
- Increase in face amount or additional coverage(s) should be done by your MGA office or our Regional Sales Office.
- In-force illustrations will usually be provided within 3 business days of the request.

Date of Request (dd/mmm/yyyy)		Policy Number	
Name of Requestor (Advisor/MGA)	Requestor Phone Number	Requestor Email address	MGA Office

Please complete the information below where applicable:

Face amount: ☐ Decrease to: $ _____ ☐ Reduced paid-up: _____

Future Planned Periodic Payment or Deposits:

☐ Keep as it is: $ _____ for _____ year(s)

☐ Increase to: $ _____ for _____ year(s)

☐ Decrease to: $ _____ for _____ year(s)

☐ Minimum premium: for _____ year(s)

☐ Lump sum of: $ _____ for _____ year(s)

☐ Other: $ _____

Assumed interest rate: _____ %

An adverse scenario of 2% below the selected interest rate will be provided.

Change Cost of Insurance from YRT to Level: ☐ Next policy year ☐ At year _____

Change Death Benefit Option to:

☐ Sum Insured plus Fund Value ☐ Sum Insured ☐ Remove Maximizer Option

Removal of Maximizer Options or a change to Sum Insured plus Fund Value might be subject to underwriting requirements.

Special Instructions: Please provide any information that will enable us to illustrate the scenario required.

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