CLIENT SUITABILITY QUESTIONNAIRE

NORTHSTAR FUNDING PARTNERS

Fill in this form on your computer, save it, and email it to support@nsfpx.com.
Prefer to do it online? Go to nsfpx.net/suitability.

* required

1 ADVISOR INFORMATION

Name *

Agency & upline

Address

State

Zip

Preferred phone *

Email *

2 CLIENT INFORMATION

Insured *

Gender *

☐ Male ☐ Female

Date of birth *

Underwriting classification

☐ Preferred Plus ☐ Preferred ☐ Standard Plus
☐ Standard ☐ Table Rated

Second insured

Second insured gender

☐ Male ☐ Female

Second insured date of birth

Second insured underwriting classification

☐ Preferred Plus ☐ Preferred ☐ Standard Plus
☐ Standard ☐ Table Rated

3 FINANCIALS

Cash & equivalents

Marketable securities

Real estate

Business

Qualified plans

Other assets

Total net worth

Occupation

Net after-tax income

Important notes about financials

4 CURRENT INFORCE LIFE INSURANCE ON ANY INSURED

Any current inforce life insurance?

☐ Yes ☐ No

Carrier

Product type

Initial death benefit

Current cash surrender value

5 PROPOSED LIFE INSURANCE POLICY

Planning objective / purpose of insurance

Initial face amount

Preferred carrier & product

Annual premium, if known

Premium years, if known

Policy ownership

☐ Irrevocable Life Insurance Trust ☐ Revocable Trust

☐ Company (LLC, LLP, etc.) ☐ Corporation

☐ Special Purpose Entity/Vehicle

State of issue

6 PROPOSED FINANCING ARRANGEMENT

Borrowing situs

☐ Trust ☐ Company/Corporation ☐ Other

Source of gap additional collateral (leave blank if I.R.A.® design)

Annual out-of-pocket cost tolerance (to cover interest, principal reduction, etc.)

Years of out-of-pocket payments, if known

Preferred lender, if known

☐ No preference ☐ Synovus (Traditional) ☐ ByLine

☐ Life Direct ☐ Synovus (I.R.A.®)

Loan payoff and/or retirement income (variable, declared, fixed, standard policy loans or withdrawals)

Has the client retained legal & tax counsel?

☐ Yes ☐ No

Anything else Northstar should know

SUBMISSION

Email the completed form to our case design team at support@nsfpx.com, or call 623-256-6902.