

Selling Your Term Life Insurance Policy *Checklist*

Once you've made the informed decision to sell your term life insurance policy, here's a checklist of the important steps to take:

You've ascertained that your term life insurance policy is convertible to a permanent life insurance policy

You meet the minimum necessary qualifications:

- At least 65 years old, or have a terminally ill diagnosis
- Your whole life insurance policy is worth a minimum of \$100,000

You have your paperwork in order:

- Whole life insurance policy documents
- Medical records/history

You've done your research, and chosen several reputable life/viatical settlement companies to contact, discuss your situation, and compare settlement offers:

Company name: _____

Contact name: _____

Settlement offer: _____

Company name: _____

Contact name: _____

Settlement offer: _____

Company name: _____

Contact name: _____

Settlement offer: _____



Questions? The life/viatical settlement experts at PolicyBank[®] are here to help.