

Selling Your Whole Life Insurance Policy *Checklist*

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

You meet the minimum necessary qualifications:

- Your whole life insurance policy is worth a minimum of \$100,000

You have your paperwork in order (not a necessity, but can be helpful):

- Whole life insurance policy documents
- Medical records/history

You've done your research, and chosen a reputable viatical/life settlement company to contact, discuss your situation, and determine if a settlement is right for you.

Company name: _____

Contact name: _____

Settlement offer: _____

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

