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INVESTTRACK™

Life

RIC NUMBER: 000-IL0000

**COMPLETED FOR:
 Jonny R. Nolsky**

**TRUST OFFICER: Bob Mursk
 TRUST ACCOUNT NUMBER: 11111B331
 ABC TRUST COMPANY**

Insurance Carrier
 Insured(s)
 Policy Number
 Plan of Insurance
 Death Benefit

ABC Life Insurance Company
 Jonny R. Nolsky & Beth L. Nolsky
 HV0000000S
 Survivor Variable Universal Life
 \$11,143,313

Policy Summary

- ▶ Funding (Lapse Year/Survival to Lapse Prob.)
- ▶ Loan
- ▶ Competitive Analysis
- ▶ Carrier Strength

Findings

Inadequate (2028/82.35%)
No Loan Reported
Non-Competitive
Secure

Trustee Attention¹

Important
No
Urgent
No

Asset Allocation Summary

- ▶ Diversification
- ▶ Allocation

Findings

High
Inconsistent

Basis For Reallocation

No
Yes