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LIFETRACK™

Replacement

RIC Number: 000-PR0000

**Completed For:
 IR TR JEROME AND BETTY JAMIESON**

Trust Officer: Rachel Jean
 Trust Account Number: 00-00-000-36784211
 ABC Trust Co

Insurance Carrier	ABC Mutual Life Insurance
Insured(s)	Jerome C Jamieson & Betty M Jamieson
Policy Number	00000000
Policy Type	Survivor Whole Life
Death Benefit	\$10,508,873
Annualized Premium	\$266,255
Net Cash Value	\$3,266,450

Existing Policy Summary

- ▶ Funding
- ▶ Loan(Amount)
- ▶ Competitive Analysis (In Force to Repl.)
- ▶ Carrier Strength
- ▶ Other

Findings

Adequate
Major (\$767,327)
Moderate Cost Savings
Strong
Risk Considerations with No Lapse Policies

Trustee Attention²

No
Important
No
No
Important

Replacement Policy Summary

- ▶ Funding
- ▶ Competitive Analysis (Repl. to Comparative)
- ▶ Carrier Strength

Findings

Adequacy Concerns
Competitive
Strong

Trustee Attention²

Informational
No
No