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LIFETRACK™

Baseline

RIC Number: 000-AP0000

**Completed For:
 P JOHN PHILLIPS TRUST**

**Trust Officer: Mary Ann Whitehead
 Trust Account Number: 44-94-000-634349
 ABC Bank**

Insurance Carrier	ABC Life Ins Co
Insured(s)	P. John Phillips
Policy Number	12345678
Policy Type	Whole Life
Death Benefit	\$915,526
Annualized Premium	\$19,780
Net Cash Value	\$204,329
Recommended Review Frequency ¹	Annual

Policy Summary

- ▶ Funding
- ▶ Loan(Amount/Accrued Interest)
- ▶ Competitive Analysis
- ▶ Carrier Strength
- ▶ Other

Findings

Adequacy Concerns
Major (\$115,749/\$7,454)
Competitive
Strong
Owner and Beneficiary Names Missing

Trustee Attention²

Important
Urgent
No
No
Informational