



J.L.Thomas & Company

A LIFEMARK PARTNER

The strength of many. The power of one.

Financial Underwriting – Key Employee - Ask "Rx" pert underwriter (ask our experts)

Producer _____ Phone _____ Fax _____

Client _____ Age/DOB _____ Sex _____

1. Company Name: _____

2. Nature of business: _____

3. Organization Type: Sole Proprietorship Partnership Corporation Other

4. Financial informatio

Annual Sales: _____ Fair Market Value: _____

Net Profit: _____ Business Net Worth: _____

5. Are the firm and its officers free from business failures, bankruptcies or pending suit

Yes _____

No, please give details including dates _____

6. Is Key Employee an owner? _____ If yes please provide percentage of ownership. _____%

7. Key Employee Facts including title, job duties, impact on net profits, biography, and description of why he or she is "Key" to the success of the business, etc:

8. Key Employee's total salary package including sala , bonuses, stock options, fringe benefits, etc:

9. Estimated cost to replace Key Employee: _____

10. Are other Key Employees similarly insured? _____