



## 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 information:

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 salary, bonuses, stock options, fringe benefits, etc:

\_\_\_\_\_  
\_\_\_\_\_

9. Estimated cost to replace Key Employee: \_\_\_\_\_

10. Are other Key Employees similarly insured? \_\_\_\_\_