



Anthony Steuer Insurance Services

Life and Disability Insurance Analyst

To Request A Life Insurance Policy Evaluation Report:

1) Print and complete the attached Evaluation Request Form (please complete one per policy).

2) Send copies of the following items:

- Policy Data Pages
- Current Inforce Illustrations (existing policy(ies)) – Download Sample Request Letter
- Original Illustration (If Available)
- Most Recent Annual Statement

3) Include check payable to “Anthony Steuer Life Insurance Services”

- \$149 for Basic Evaluation Service or
- \$449 for Comprehensive Evaluation Service

Optional:

- \$10 – Additional Fee if you would prefer to receive your evaluation report by mail

4) Mail to address below.

Please Note:

Submitted materials will not be returned, please retain originals for your records.

You will be notified by email upon receipt

Once your materials are received they will be reviewed and a report will be generated and delivered to you by email in PDF format in approximately 10 business days (\$10 fee to receive report by mail).



Anthony Steuer Insurance Services

Life and Disability Insurance Analyst

Life Insurance Policy Evaluation Request Form

Requestor Information

First Name: _____ Last Name: _____
 Mailing Address: _____
 City: _____ State: _____ Zip Code: _____
 Email Address: _____ Daytime Phone Number: _____

Policy Information (Use separate sheets for each policy):

Insurance company name: _____
 Policy Number: _____ Type of Policy: _____
 Insured's First Name: _____ Last Name: _____
 Sex: _____ Date of Birth: _____
 Policy owner's full name (or name of trust): _____

For Comprehensive Service: Total Estimated Income Tax Bracket: _____%

Services Selection Form:

	Price	Quantity	Total
Basic Evaluation Service	\$149		\$
Comprehensive Evaluation Service	\$449		\$
Fee to receive copy by U.S. Mail	\$10		\$
Grand Total:	-----	-----	\$

Please make check payable to Anthony Steuer Insurance Services

Additional information and Comments (please attach extra page(s) if needed):

