

## Term Conversion/ Rewrite Worksheet

### Client Information

Client Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
 Current/Closest Age: \_\_\_\_\_/\_\_\_\_\_ Gender: \_\_\_\_\_ Age of 50%/80% Mortality: \_\_\_\_\_/\_\_\_\_\_

### Existing Coverage

Carrier Name: \_\_\_\_\_ Level Term Period: \_\_\_\_\_  
 Issue Date: \_\_\_\_\_ End of Conversion Date: \_\_\_\_\_  
 Issue Class: \_\_\_\_\_ Premium Mode: \_\_\_\_\_

Year	Age	Current Term Rates	Guaranteed Term Rates	Conversion Premiums	Current Conversion Surrender Cash Value	Net Cost of Conversion
1						
2						
3						
4						
5						
<b>Total Years 1-5</b>						
6						
7						
8						
9						
10						
<b>Total Years 1-10</b>						
11						
12						
13						
14						
15						
<b>Total Years 1-15</b>						
16						
17						
18						
19						
20						
<b>Total Years 1-20</b>						

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### Existing Coverage

Carrier Name: \_\_\_\_\_ Level Term Period: \_\_\_\_\_  
 Issue Date: \_\_\_\_\_ End of Conversion Date: \_\_\_\_\_  
 Issue Class: \_\_\_\_\_ Premium Mode: \_\_\_\_\_

### Alternative Coverage

Carrier Name: \_\_\_\_\_ Plan Name: \_\_\_\_\_ Solve to Age: \_\_\_\_\_

Year	Age	Current Term Rates	Guaranteed Term Rates	Alternate Coverage Premium	Alternate Coverage Surrender Cash Value	Net Cost of Alternate Coverage
1						
2						
3						
4						
5						
<b>Total Years 1-5</b>						
6						
7						
8						
9						
10						
<b>Total Years 1-10</b>						
11						
12						
13						
14						
15						
<b>Total Years 1-15</b>						
16						
17						
18						
19						
20						
<b>Total Years 1-20</b>						

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### Existing Coverage

Carrier Name: \_\_\_\_\_ Level Term Period: \_\_\_\_\_

Issue Date: \_\_\_\_\_ End of Conversion Date: \_\_\_\_\_

Issue Class: \_\_\_\_\_ Premium Mode: \_\_\_\_\_

### Rewrite Term Carrier and Plan

Carrier Name: \_\_\_\_\_ Plan Name: \_\_\_\_\_ Term Length: \_\_\_\_\_

Year	Age	Current Term Rates	Guaranteed Term Rates	Rewrite Term Rates
1				
2				
3				
4				
5				
<b>Total Years 1-5</b>				
6				
7				
8				
9				
10				
<b>Total Years 1-10</b>				
11				
12				
13				
14				
15				
<b>Total Years 1-15</b>				
16				
17				
18				
19				
20				
<b>Total Years 1-20</b>				

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