

# Parcside Equity, LLC

## Life Settlement Submission Checklist

### **Price Commitment** (minimum required to receive a Commitment to Purchase)

- Completed, Signed and witnessed application including:**
  - Insured data; full name, address, DOB, SSN.
  - Policy Owner; full name, address.
  - Policy information including insurance company, policy number, face amount, premium amount and due date, issue date, type of policy.
- Current signed medical authorization (if survivorship, one for each insured).**
- Complete medical records including office notes, labs, pathology reports and x-rays.**  
If you want us to obtain medical records, provide:
  - Physicians information; full name, address, medical condition treated for, medical history.
- Complete current inforce illustration.** (prepared within the last 30 days and containing all pages. Please confirm maturity age.)
  - **Universal Life** - reflect level premium for all years to have \$1,000 of cash value at age 100 (or maturity).
  - **Whole Life** – reflect contract premium payable for all years.
  - **Term** – reflect premium stream to maturity.
- Current account value and cash surrender value.**
- If Trust Owned**, copy of trust and trust domicile state.
- Other** (not required but desirable).
  - Copy of the policy.
  - Policy Statement or Annual Report.
  - Authorization to obtain policy information.

If the above-mentioned is provided at the time of submission, processing time can be dramatically reduced. In addition, please let us know whether the case is complete or if additional information is to follow (i.e. APS's and/or illustration, or if we should order medical records and/or illustrations).

### Customer Service

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