

Checklist

Premium Financing

This checklist should be used for the submission of premium financing cases to Symetra Life Insurance Company.

Complete Symetra Forms

- Life insurance application and required supplemental forms
- Acknowledgement and disclosure for premium financed life insurance policies
- Financial supplement
- Trustee certification form (if trust-owned)
- Business entity certification form (if business-owned)

Additional Documentation

- Cover letter (includes purpose of life insurance, name of lender, need for financing and exit strategy(ies) other than death)
- Copy of producer E&O coverage to include premium financing
- Two years of past tax returns
- Executed trust document form (if trust-owned)
- Signed life insurance illustration
- Copy of final supplemental illustration (premium finance spreadsheet)

Lender Documentation

- Lender term sheet/offer letter
- Collateral assignment form

High-Net-Worth Foreign Nationals (Non-Resident Aliens)

Additional forms for high-net-worth foreign national case submissions:

- As applicable, life insurance solicitation form for direct non-U.S. ownership or, life insurance solicitation form for U.S. ownership.
- Department of Homeland Security records consent agreement
- Limited durable power of attorney (if non-U.S. resident foreign national owner)
- If applicable, IRS form W-8BEN (or other applicable tax form). Please contact your financial or tax professional for further guidance.

Questions?

For further assistance, contact the Symetra Advanced Markets Team at (781) 398-4504.