

Insurance Summary and Review Roadmap



**Williams
Financial
Services
Corporation**

Client Name(s): _____

Date: _____

4000 Mitchellville Road, Suite B226
Bowie, Maryland 20716
Phone (301) 805-5538, Fax (301) 805-0124

Insured				
Death Benefits				
Insurance Company				
Policy Type**				
Policy Number				
Annual Premium				
Premium pd to date				
Cash Value /Surrender Value				
Owner*(if trust, state trustee)				
Primary Beneficiary				
Contingent Beneficiary				
Risk Class at purchase				
"As-Sold" Rate vs. Current Rate				
Policy Loan/Rate				
Servicing Agent				

*Owner: H=Husband, W=Wife, J=Joint with Spouse, C=Community Property, T=Trust – if trust please include trustees

**Type: T=Term, WL=Whole Life, UL=Universal Life, VUL=Variable Universal Life, Indicate survivorship polices with an "S"

Securities and Advisory offered through H. Beck, Inc., Member FINRA, SIPC
Williams Financial Services Corporation and H. Beck, Inc. are unaffiliated.