Leveraged Credit Shelter Trust Calculator

Use this form to collect the information needed to input into the calculator.

CLIENT INFORMATION

		SMOKER	NON-SMOKER	(U.S. CITIZEN) YES	NO
CLIENT(S) NAME	DATE OF BIRTH / /	○	○	○	○
CLIENT(S) NAME	DATE OF BIRTH / /	○	○	○	○
CLIENT(S) NAME	DATE OF BIRTH / /	○	○	○	○

ADDRESS

BUSINESS ADDRESS

ANY OTHER RESIDENCE

CREDIT SHELTER TRUST INFORMATION

TRUST INCOME TAX RATE % _____ PRE-TAX GROWTH RATE FOR NON-INSURANCE ASSETS _____ %

BEGINNING OF YEAR TRUST BALANCE $_____

STRATEGY

☐ PURCHASE SPECIFIED AMOUNT OF LIFE INSURANCE $ _____ , AND PAY PREMIUM FOR _____ YEARS.

☐ PURCHASE MAXIMUM AMOUNT OF LIFE INSURANCE WITH A SPECIFIC PREMIUM OF $ _____ FOR _____YEARS.

☐ PURCHASE MAXIMUM AMOUNT OF LIFE INSURANCE USING _____ % OF TRUST ASSETS IN A SINGLE PAYMENT.

PRODUCER INFORMATION

NAME

FIRM

ADDRESS

FAX EMAIL

For further assistance contact the Sun Life Financial Sales Desk at 800-786-5433, ext. 7253.

All guarantees are based on the claims-paying ability of the issuing company, either Sun Life Assurance Company of Canada (Wellesley Hills, MA), Sun Life Assurance Company of Canada (U.S.) (Wellesley Hills, MA) or, in New York, Sun Life Insurance and Annuity Company of New York (New York, NY). All are members of the Sun Life Financial group of companies.

NOT FDIC/NCUA INSURED • MAY LOSE VALUE • NO BANK/CREDIT UNION GUARANTEE • NOT A DEPOSIT • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY

© 2009 Sun Life Assurance Company of Canada. All rights reserved. Sun Life Financial and the globe symbol are registered trademarks of Sun Life Assurance Company of Canada.

XMSD 44/847 (Exp. 08/10) SLPC 20066 (02/09)

Sun Life Financial®