## Checklist



## **Premium Financing**

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

Complete Symetra Forms	Lender Documentation
☐ Life insurance application and required supplemental forms	☐ Lender term sheet/offer letter ☐ Collateral assignment form
Acknowledgement and disclosure for premium financed life insurance policies	
☐ Financial supplement	High-Net-Worth Foreign Nationals (Non-Resident Aliens) Additional forms for high-net-worth foreign national case submissions:
☐ Trustee certification form (if trust-owned)	
☐ Business entity certification form (if business-owned)	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
Additional Documentation	Limited durable power of attorney (if non-U.S. resident foreign national owner)
<ul> <li>Cover letter (includes purpose of life insurance, name of lender, need for financing and exit strategy(ies) other than death)</li> </ul>	If applicable, IRS form W-8BEN (or other applicable tax form).  Please contact your financial or tax professional for further quidance.
☐ Copy of producer E&O coverage to include premium financing	garactor
☐ Two years of past tax returns	
Executed trust document form (if trust-owned)	
☐ Signed life insurance illustration	
<ul> <li>Copy of final supplemental illustration (premium finance spreadsheet)</li> </ul>	
	Questions?

Symetra Life Insurance Company 777 108th Avenue NE, Suite 1200 Bellevue, WA 98004-5135

www.symetra.com

Symetra® is a registered service mark of Symetra Life Insurance Company.

Life insurance is issued by Symetra Life Insurance Company, 777 108th Avenue NE, Suite 1200, Bellevue, WA 98004-5135. Products are not available in all U.S. states or any U.S. territory.

Markets Team at (781) 398-4504.

For further assistance, contact the Symetra Advanced

The lender in a premium financing arrangement is an independent third party lender and is not affiliated with Symetra Life Insurance Company. An owner must qualify for the third-party loan and meet the collateral requirements of the lender.

This premium financing checklist is subject to change at any time.