

LIFE INSURANCE ADVISER DISCLOSURE FORM

Adviser: _____ Product: _____

- How do you get paid (fees, commissions, both)?
- How are fees determined (hourly rate, fixed, percentage)?
- What services do you offer?
- How long have you been providing insurance advice?
- What is your professional and educational background?
- Have you ever been disciplined by a regulatory or professional organization?
- Indicate below the types of compensation you will receive for your services, with estimated amounts when applicable:

Type of Compensation	Amount
Fees: Hourly Fixed % of _____ Other	
Commissions and overrides: First year Renewal years	
Expense allowances: First year Renewal years	
Sales conventions	
Other sales prizes	
Other benefits:	

Adviser's signature

Date