Questionnaire



Executive Bonus Checklist

Use this checklist when gathering information alongside the client to help the case go through underwriting efficiently. Complete a separate checklist for each person receiving a bonus.

Executive Name:	Percent ownership:
Title/Position:	
Age:	Death Benefit amount: \$
Salary: \$	
Type of bonus arrangement	
☐ Standard executive bonus	
☐ Double bonus	
Bonus payout timeframe	
☐ Until retirement:	
☐ Until date:	
☐ Until age:	
☐ Other:	
How was the planned bonus amount and death b	
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Next Steps

When ready to proceed, fill out the required business insurance supplement form and submit it along with the completed application.

Including this checklist and a cover letter can also aid the underwriting process.

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