# Submit a Case to
# Life Settlement Advisors, LLC

___ 1. Complete the **Life Settlement Application.** If the owner/seller and insured of the policy are different, both signatures are required. A copy of this can be sent via fax or email, but please return the original by mail.

___ 2. Provide a signed copy of the **HIPAA Release Form**

- Note – For joint policies, each insured should sign a copy.
- Do NOT date the release forms due to the possibility of delays when obtaining medical records.

___ 3. Provide a copy of the **Life Insurance Policy**, including the beneficiary designation and the application. This can be an electronic version, but the original will be needed during the closing stages.

___ 4. Provide a copy of any **Trust** section with life insurance.

___ 5. Signed **Reprojection Letters** to obtain policy information and illustrations. This will be provided to you after we have received a copy of the policy and the application.

- Do NOT date the reprojection letter due to the possibility of delays

Once this information has been collected, we can begin the process of gathering data for a possible life settlement transaction. Feel free to contact us with any questions regarding the checklist or with any other concerns.

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