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| **RIC Participant Account Information** | **April 9, 2024** |
|  |
| Participant Name |  |
| SSN |       |
| Provider |  |
| Provider Phone  |       |
| Service Representative Name |       |
| Policy Number |       |
| Policy Date |       |
| Policy Type |  |
| Current Value | $      as of       |
| Surrender Value | $      as of       |
| Surrender Schedule |       from [ ]  orig policy date or [ ]  per contrib |
| Date of Last Contribution |       |
| Recapture Bonus |       |
| Current Penalty-free Amount | $      annual penalty free amount      % or $      |
| Surrender Penalty if Rolled  | $      (     %) |
| Surrender Penalty if Retired | $      (     %) |
| Need Provider Form to Distribute? | [ ]  yes [ ]  no |
| Allocation of Participant Assets | [ ]  variable [ ]  fixed [ ]  both |
| Fixed Rate |      % |
| Death Benefit |       |
| M&E Fees |      % Other      % |
| Annual Contract Fee | $     /year |
| Avg Fund Mgt Fee |      % |
| Access Account Info on web? |       |
| RIC Staff Member |       |
| Comments |       |