Inheritance Advance Worksheet

First name _____ **Last name** _____

Address _____ **Apt /Unit #** _____

City _____ **State** _____ **Zip** _____

Phone number _____ **Cell phone** _____ **Fax** _____

E-Mail address _____

How much lump sum cash do you need now? **$** _____

Name of Deceased? _____ **Date of Death** _____

Relationship of Deceased to You _____

Amount you anticipate inheriting _____

Have you received any inheritance to date? ❑ **Yes** ❑ **No** **If yes, amount** _____

Have you borrowed against your inheritance? ❑ **Yes** ❑ **No** **If yes, amount** _____

State where is the estate located? _____ **Estimated size of the estate** _____

Executor's name _____ **Phone** _____

Attorney's name _____ **Phone** _____

What are your current needs? (Why would you like an inheritance advance)

Complete the form and return via email to our offices. You will receive a call from one of our underwriters within 24 hours of submission.