



Risk Assessment Audit

To Whom It May Concern:

Please accept this letter as authorization for the individual(s) named below to be provided with pertinent information for the below referenced policy(ies). This information may include copies of my most recent statements/policy values as well as in-force ledgers as needed to analyze my policy. _____ DOB: _____ SSN: ____ Insured #1: Insured #2: DOB: SSN: Policy #1 applies to: Insured #1 Insured #2 Insurance Company*: _____ Owner is the Insured Owner's SSN or Tax ID*:___ Policy Number (optional):_____ Owner's DOB or Trust Date (if applicable): Owner/Trustee: _____ Policy Owner's Address: *required information Policy #2 applies to: Insured #1 Insured #2 Insurance Company: _____ Owner is the Insured Owner's SSN or Tax ID: Owner's DOB or Trust Date (if applicable): Owner/Trustee: Policy Owner's Address: _____ Authorization: I authorize Trumark, to obtain information, including any statements and in-force ledgers needed, to provide me with a review of the above referenced policy. Signature of Insured #1 Signature of Insured #2 Printed Name of Insured #1 Printed Name of Insured #2 Signature of Owner/Trustee #1 (if different than insured) Signature of Owner/Trustee #2 (if different than insured) Printed Name of Owner #1 Printed Name of Owner #2 Please return to: 201 North Civic Drive, Suite 360, Walnut Creek, CA 94596 FAX 925-472-3909 EMAIL insurance@alamocapital.com

Please refer to all materials available in relation to your proposed policy/contract, such as quotes, prospectus, etc, thoroughly before investing in an insurance vehicle. All products not available in all states. Insurance policies can include limitations, restrictions and exclusions. Please consult with a licensed insurance professional for full details and disclosures to ensure the product is suitable for you and your needs. The security of your personal information is important to us. We follow generally accepted industry standards to protect the personal information submitted to us, both during transmission and once we receive it. No method of transmission over the Internet, or method of electronic storage, is 100% secure, however. Therefore, we cannot guarantee its absolute security.

201 N. Civic Dr. #360 • Walnut Creek, CA 94596 Local: (925) 472-5700 • Toll Free: (877) 68-ALAMO • Fax: (925) 472-3909