

MILESTONE Managers & Providers

Pennsylvania Limited Liability Companies

Purchase Parameters

\$50,000 - \$950,000 Pricing within 48 Hours of Submission Contracts within 24 Hours after acceptance**

- Accept UL, Term (must be convertible), SUL, and WL.
- Minimum age requirement of 68 years old, unless in sub-standard health.
- No premium financed cases accepted.
- Must be out of the contestability period.
- No Life Expectancies required; Only application and illustration to maturity for initial evaluation
- AVS or Fasano may improve pricing if the mortality table is greater than 100%.
- No minimum or maximum Life Expectancy.
- Submit medical records and HIPAA if available; we will need in order to go to closing.
- Not accepting policies owned in AK, FL, GA, KY, ME, NE, NJ, ND, NV, OH, OK, UT, WV

\$1,000,000 – UNLIMITED* Pricing within 7-14 Days of Submission Contracts within 24 Hours after acceptance**

- Accept UL, WL, Term (must be convertible), SUL (if one insured is deceased)
- Minimum age requirement of 65 years old, unless in sub-standard health.
- No premium financed cases accepted.
- Able to accept policies within the contestability period on a case by case basis.
- Require Illustration with account values to Age 100 within 180 days of submission.
- Require 2 Life Expectancies (AVS/Fasano/21st) dated within 180 days of submission.
- No minimum or maximum Life Expectancy.
- Not accepting policies owned in AK, FL, GA, KY, ME, NE, NJ, ND, NV, OH, OK, UT, WV

Submit all documents and updates to files@milestonesettlements.com.

Contact Information

Matthew Boaman	New Business	mboaman@milestonesettlements.com
Thomas Reading	New Business	treading@milestonesettlements.com
Brad Hotzman	Pricing/Bidding	bhotzman@milestonesettlements.com
Nik Volkov	Pricing/Bidding	nvolkov@milestonesettlements.com

** Evaluation time dependent on overall quantity of case submissions

*Parameters subject to change due to market conditions