

## *The Life Settlement Transaction Process*



The Life Settlement process begins with a preliminary policy evaluation.

Here is an outline of how the process works. The transaction process typically takes from 3 to 16 weeks:

- ◀ A completed life settlement application and authorization is submitted to Peachtree along with carrier illustrations and the insured's medical records for the last five years (and life expectancy reports if these are available);
- ◀ New life expectancy reports are ordered on the insured from specialized life expectancy underwriters;
- ◀ Once Peachtree receives life expectancy reports, the policy is evaluated to determine if an offer can be made to the policy owner;
- ◀ If the offer is accepted, Peachtree will dispatch closing documentation (life settlement contract and related exhibits) to the policy owner;
- ◀ After receiving duly executed closing documents and upon completion of the due diligence and underwriting process, change of ownership and change of beneficiary forms are sent to the life insurance company; and
- ◀ Upon confirmation of the change forms being processed, funds are released to the policy owner.

### **Next steps**

For further details on having a life insurance policy evaluated for a potential life settlement transaction please call Peachtree Life Settlements at 1.866.864.6886.

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**For more information,  
call today  
1.866.864.6886**