



# VALUATION FORM



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...GET A BETTER DEAL FROM AAP

- ◆ Up to 35% more cash than surrender value for suitable policies
- ◆ Generous commission paid
- ◆ AAP will value with profit endowment policies that meet the following criteria - see overleaf

**TO CHECK IF YOUR CLIENT'S POLICY IS SUITABLE - SEE OVERLEAF FOR DETAILS**

## How to complete this form

Fill in Sections **A** & **B** as best you can but do not worry if you don't have all the information available. As long as your client completes and signs Section **C** we can obtain any missing information from the life office.

**AAP dedicated valuations faxline 020 8732 4020**

AAP Limited  
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Section <b>A</b> Broker Details		Address
Company		
Contact Name		
Telephone		
Fax		
E-mail		

Section <b>B</b> Policyholder(s) Details		Ref:
	<b>1st Named Policyholder</b>	<b>2nd Named Policyholder</b>
Policy Holder Full Name		
Date of Birth		
Policy Holders Address		
Post code		
Telephone Numbers	Daytime	Daytime
	Evening	Evening
	Mobile/Email	Mobile/Email

Policy Details	
Insurance Co Name	Basic Sum Assured £
Policy No.	Total Attaching Bonuses £
Date Policy Started	Date Bonuses Attached To
Maturity Date	Gross Premium £
Surrender Value	Premium frequency (ie Monthly etc)
Date Surrender Value Obtained	Current location of Policy

Section <b>C</b> Authorisation		This section needs to be signed so that the Life Company can provide us with information regarding the policy (policies)
Insert name of Life Company	To:	Policy No'(s)
Please supply Absolute Assigned Policies or their legal representatives with any information they may require regarding the above policy(ies)		
Signature(s)		
	Signed (Policyholder 1)	Signed (Policyholder 2)

# Policy Selection Criteria

## 1 Start Date

The policies must have started in 1998 or earlier.

## 2 Traditional with profits

The policy must be a traditional with profits policy that receives an annual bonus declaration. Unit linked or "unitized" policies are not traded.

## 3 The Life Office

Life offices whose endowment policies are currently traded are listed opposite.

## 4 Whole of Life Policies & "Paid-Up" Policies

We can value these but require the client's signature as referred to in No.5 below.

## 5 Action Required

To obtain a free valuation, **FAX THIS COMPLETED FORM to AAP**. Do not worry if you do not have all the information required; however **please ensure that the policy number has been entered and that the client signs the form if any information is incomplete**.

**Once we have all of the information available, we will process the data onto our computer system to provide a free valuation. If you require any assistance, please do not hesitate to phone our Valuation Department on 0208 282 8000.**

## 10 main reasons why policy holders seek to sell their Endowment Policies

- ◆ Restructure finances/repay mortgage
- ◆ Moving House
- ◆ Divorce
- ◆ Wish to raise capital early, rather than waiting for maturity
- ◆ Substantial debts or possible insolvency
- ◆ Redundancy
- ◆ Unable to maintain premium payments
- ◆ Fear that endowments will not cover future mortgage payments
- ◆ Raising finance for specific items or projects
- ◆ Life cover and savings superfluous to present requirements

AMP  
AXA Equity & Law  
AXA Sunlife  
Britannia  
Britannic Assurance (Alba)  
Canada Life  
Clerical Medical  
Colonial Mutual  
Commercial Union (CGU)  
Co-op (CIS)  
Crusader (Alba)  
Eagle Star  
Ecclesiastical Insurance Group  
Friends Provident  
General Accident (CGU)  
Guardian  
Irish Life  
Laurentian Life/Imperial (Lincoln)  
Legal & General  
Imperial Life (now Lincoln)  
Life Association of Scotland (Alba)  
Liverpool Victoria  
London Life  
London & Manchester  
MGM  
National Farmer's Union  
National Mutual  
National Mutual Life of Australasia (Friends Provident)  
National Provident Institution (NPI)  
Norwich Union  
Pearl Assurance  
Provident Life (Winterthur)  
Provident Mutual (CGU)  
Provincial Life (Scottish Provident)  
Prudential  
Refuge Assurance (United Friendly)  
Royal Life (Royal & Sun Alliance)  
Royal London Mutual  
Scottish Amicable  
Scottish Equitable  
Scottish Life  
Scottish Mutual  
Scottish Provident  
Scottish Widows  
Standard Life  
Sun Alliance (Royal & Sun Alliance)  
Sun Life of Canada  
Sun Life Assurance  
Swiss Life  
Teachers Provident  
UK Provident (Friends Provident)  
United Friendly  
Wesleyan Assurance  
Windsor Life (Gresham)  
Yorkshire General (now General Accident)