



PERSONAL LOAN COLLATERALIZATION COVER LETTER WORKSHEET

Client Name: _____ Date of Birth: _____

Loan Details

Initial Loan Amount: _____
Current Loan Balance: _____
Lender: _____
Year Originated: _____

Personal Financial Information

Assets: Liabilities: _____
Net Worth: _____
Personal Income: _____

Proposed Insured's Existing Insurance

Insurance Company	Face Amount	Year Issued	Replacement (Yes/No)

Reason lender is requesting insurance coverage:

Additional Comments:

