MOUNTAIN LIFE INSURANCE COMPANY
LOAN OFFICER REPORT DATA SHEET
Term Only

SEND REPORT TO:

ACCOUNT NAME **ACCOUNT #**

ADDRESS **TELEPHONE #**

CONTACT PERSON **EMAIL ADDRESS:**

LOAN OFFICER INFORMATION		SECRETARY INFORMATION	
LOAN OFFICER NAME	OFFICER # OR INITIAL	SECRETARY NAME	SECRETARY # OR INITIAL

PERCENTAGE TO BE CALCULATED FOR: LOAN OFFICER _____ SECRETARY _____

TO BE CALCULATED ON: FIRST YEAR ONLY ☐ OR FIRST YEAR AND RENEWALS ☐

AMOUNT TO BASE PERCENTAGE ON: PREMIUMS ☐ OR COMMISSIONS ☐

OTHER NOTES