

**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:  
\_\_\_\_\_  
\_\_\_\_\_