



High Net Worth Foreign National Program

Preliminary Eligibility Checklist

Please review the following requirements. If you answer “No” to any of the questions below, then the case will not qualify for this program under Penn Mutual’s guidelines.

Adviser Eligibility	Yes	No
Confirmation of eligibility received from local Penn Mutual field office		
Eligibility Requirements	Yes	No
All aspects of solicitation and the application process will take place in the U.S.		
Insured is between the ages of 25-70		
Minimum of \$2.5 million net worth based on U.S. sourced assets		
U.S. resident for the last 3 years with the intent to continue residing in the U.S. permanently		
Citizen of a country from Penn Mutual’s current approved country list		
Total underwriting amount at Issue of \$15 Million and under (less any Penn Mutual inforce coverage)		
Total amount of inforce coverage and formal applications applied for (including replacements) less than or equal to \$35 Million		
U.S. owned (policy cannot be owned by the foreign national)		

If you have answered “Yes” to all of the above criteria, please complete the following information about the foreign national (insured) and email to quickquotes@pennmutual.com.

Age: Gender: Initial Face Amount:

Product:

U.S. Net Worth:

Country of Citizenship:

U.S. Visa Type:

Name and Relationship of Proposed Policy Owner:

Need for U.S. Dollar Policy:

Other pertinent information related to this application:

For Adviser Use Only.