

The TOLI Vault

Tracking Of Life Insurance - A New Professional Standard

POLICY HOLDERS

TRUST OWNED

CORPORATE OWNED

INDIVIDUALLY OWNED

Unmatched Policy Care
Policy Performance Evaluation System
Carrier Monitor Tool
Advisor Monitoring
TOLI Vault Access

Capital Formation Group
60 Walnut Street, Wellesley, MA 02481

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POLICY HOLDER ADVOCACY PROCESS

1 POLICY MANAGEMENT

Establish Design Guidelines

Gather Policy Information

Monitor Policy Performance

Policy Management Reminders

2 POLICY MONITORING

Policy Reports

Carrier Monitoring

Document Storage

Vault Access for Advisors
and Policy Contacts

3 POLICY MANAGEMENT AND MONITORING ALERTS

Tracks and Audits Policy Duties

Policy Assurance Protocols
in place to ensure policy
information is updated in a
timely manner