

# PRINT + PIN UP!

Insured Person	Bob Banker	Life Company: Equitable
Policy Anniversary date	Dec 1, 2021	
Annual Total PUA Capacity	10,312	
Date for PUA Payments	Total Payment Sent	Total Remaining PUA Deposit Room for the year
Jan 1, 2022	1,000	9,312
Feb 1, 2022	1,000	8,312
May 25, 2022	4,500	3,812
July 19	800	3,012
Aug 20	2,000	1,012
Sept 15	500	512 ☺
Oct 10	512	0

\*The goal is to hit the maximum target of PUA for the year. Print this sheet and place it physically so you can check of your total PUA amounts and you will always know how much you have left to fund in a year. Also Make sure you send your final PUA payment a minimum of 22 days before the anniversary. With some companies that is the last day they will accept it for that given policy year. *TIP: remember that the policy year does not match the calendar year. Everything goes from the policy anniversary date. TIP #2 - The earlier in the year you fund PUA the more impact it has on the policy and often the dividends received in that year.*