



LESLIE M OTTOLENGHI

Prepared For:

Leslie M Ottolenghi
on May 13, 2025

Prepared By:

Mark L. Burden
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As Of: May 12, 2025

Insurance Summary

Life Insurance

Policy Number	Product Type	Benefits/ Policy Date	Net Death Benefit	Annualized Premium	Last Ann Div/ Div Option	Total Loans	Net Accumulated Value ²
25317317	WL PLUS 100						
Insured:	Leslie M Ottolenghi		\$2,500,000.00	\$83,078.40	\$0.00	\$0.00	\$4,511.25
Owner:	Leslie M Ottolenghi	11/11/2024	as of 05/12/2025		PUR ADDS		
Payer:	Leslie M Ottolenghi	Includes Blended Term					
Direct Beneficiary: Estate Of Insured							
Contingent Beneficiary:							
25169757	WHOLE LIFE ONE						
Insured:	Leslie M Ottolenghi		\$1,000,000.00	\$48,435.00	\$0.00	\$0.00	\$3,171.00
Owner:	Leslie M Ottolenghi	07/11/2024	as of 05/12/2025		PUR ADDS		
Payer:	Leslie M Ottolenghi						
Direct Beneficiary: Estate Of The Insured							
Contingent Beneficiary:							
20768249	ESTATE COMPLIFE						
Insured:	Leslie M Ottolenghi		\$418,933.00	\$4,140.86	\$5,695.07	\$0.00	\$182,186.75
Owner:	Leslie M Ottolenghi	05/11/2014	as of 05/12/2025		QUICK PAY PLUS		
Payer:	Leslie M Ottolenghi						
Direct Beneficiary: Estate Of The Insured							
Contingent Beneficiary:							
20751695	ESTATE COMPLIFE						
Insured:	Leslie M Ottolenghi	WP	\$955,902.00	\$10,087.82	\$13,389.85	\$0.00	\$415,608.44
Owner:	Leslie M Ottolenghi	05/11/2014	as of 05/12/2025		PREM RED		
Payer:	Leslie M Ottolenghi						
Direct Beneficiary: Estate Of The Insured							
Contingent Beneficiary:							
20121101	LEVEL TERM 20						
Insured:	Leslie M Ottolenghi		\$2,500,000.00	\$6,078.96	\$0.00	\$0.00	N/A
Owner:	Leslie M Ottolenghi	12/11/2012	as of 05/12/2025		PREM RED		
Payer:	Leslie M Ottolenghi						
Direct Beneficiary: Estate Of The Insured							
Contingent Beneficiary:							
17809874	90 LIFE						
Insured:	Leslie M Ottolenghi	WP	\$1,336,630.00	\$25,056.00	\$19,473.19	\$0.00	\$540,391.19
Owner:	Leslie M Ottolenghi	03/11/2007	as of 05/12/2025		PUR ADDS		
Payer:	Leslie M Ottolenghi						
Direct Beneficiary: Estate Of Insured							
Contingent Beneficiary:							

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Insurance Summary

Life Insurance

Policy Number	Product Type	Benefits/ Policy Date	Net Death Benefit	Annualized Premium	Last Ann Div/ Div Option	Total Loans	Net Accumulated Value ²
16539051	90 LIFE						
Insured:	Leslie M Ottolenghi	WP	\$693,744.00	\$10,450.44	\$9,605.61	\$0.00	\$301,430.24
Owner:	Leslie M Ottolenghi	08/11/2003	as of 05/12/2025		PUR ADDS		
Payer:	Leslie M Ottolenghi						
Direct Beneficiary:	Estate Of The Insured						
Contingent Beneficiary:							
Life Insurance Subtotal	Leslie M Ottolenghi		\$9,405,209.00	\$187,327.48	\$48,163.72	\$0.00	\$1,447,298.87
18419521	90 LIFE						
Insured:	Matthew A Ottolenghi	APB, WP	\$1,333,477.00	\$5,260.08	\$3,418.69	\$0.00	\$89,515.63
Owner:	Leslie M Ottolenghi	12/09/2008	as of 05/12/2025		PUR ADDS		
Payer:	Leslie M Ottolenghi						
Direct Beneficiary:	Leslie M Ottolenghi						
Contingent Beneficiary:	Maryann M Ottolenghi						
Life Insurance Subtotal	Matthew A Ottolenghi		\$1,333,477.00	\$5,260.08	\$3,418.69	\$0.00	\$89,515.63
Life Insurance Total			\$10,738,686.00¹	\$192,587.56	\$51,582.41	\$0.00	\$1,536,814.50

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Additional Purchase Benefit Options and Term Conversions Options

Upcoming Options by Date

Type	Policy Number	Product Type	Details
Additional Purchase Benefit	18419521	90 LIFE	The Additional Purchase Benefit (APB) in your contract allows you to purchase an additional \$150,000.00 of protection without further underwriting. You can exercise this option between 10/10/2029 and 1/8/2030.
Insured : Matthew A Ottolenghi			
Owner : Leslie M Ottolenghi			
Payer : Leslie M Ottolenghi			

Payments

Monthly Payments

Payer: Leslie M Ottolenghi
Billing Account: 9563798
Account Surplus: \$214.30
Billing Method: Electronic Fund Transfer - Sticker BANK OF AMERICA, N.A.(9662)
Due Date: 06/11/2025

Insured	Contract Number	Product Type	Monthly Premium	Allocated Dividend	Loan Repayment	Payment
Leslie M Ottolenghi	25317317	WL PLUS 100	\$6,923.20	\$0.00	\$0.00	\$6,923.20
Leslie M Ottolenghi	25169757	WHOLE LIFE ONE	\$4,036.25	\$0.00	\$0.00	\$4,036.25
Leslie M Ottolenghi	20121101	LEVEL TERM 20	\$506.58	\$0.00	\$0.00	\$506.58
Leslie M Ottolenghi	17809874	90 LIFE	\$2,088.00	\$0.00	\$0.00	\$2,088.00
Leslie M Ottolenghi	16539051	90 LIFE	\$870.87	\$0.00	\$0.00	\$870.87
Matthew A Ottolenghi	18419521	90 LIFE	\$438.34	\$0.00	\$0.00	\$438.34
Life Insurance Subtotal:			\$14,863.24	-	\$0.00 +	\$0.00 = \$14,863.24
Additional Payment:						\$0.00
Service Charge:						\$0.00
Account Total:						\$14,863.24
Total Monthly Payments:						\$14,863.24

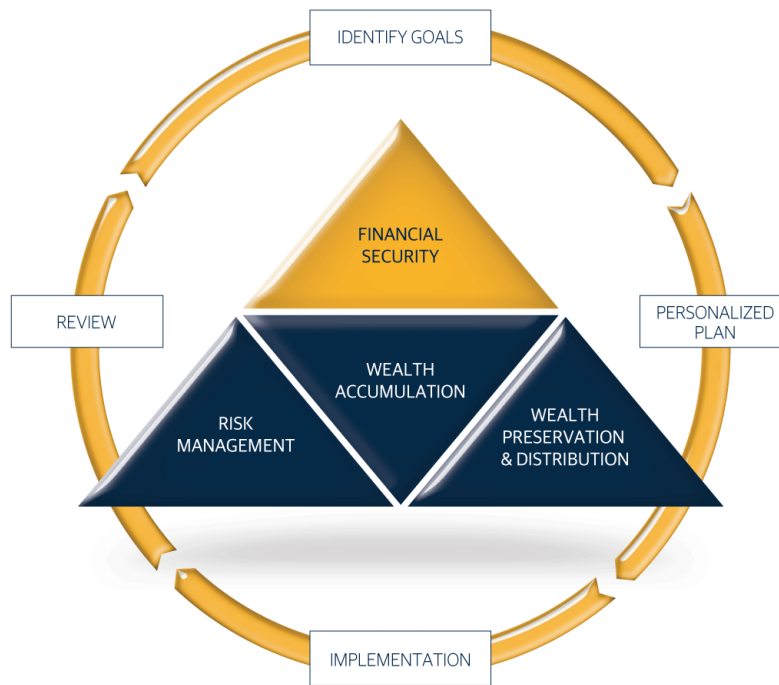
Information shown is only for payments made through an active Billing Account or for a Universal Life (ULife) product. ULife payments include those paid via Direct Mail or Electronic Funds Transfer (EFT). Please contact your Financial Representative for more information.

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The pyramid, a symbol of stability, illustrates three basic financial security needs: protecting against risk; preparing for the future by accumulating assets through saving and investing; and preserving wealth for a lifetime.

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End Notes

- ¹ The grand total amounts shown may include the values of policies with different policyowners, insureds and beneficiaries; please refer to the policies or contact your financial representative for more information.
- ² The Accumulated Value is, depending on the contract, either the (a) policy value, or (b) the cash value plus a non-guaranteed dividend, if any, that may be paid at the time the policy is surrendered. The value is based on the assumption that all premiums have been paid on time and in full.

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We have collected values for the assets shown which were available as of the date shown. For the most up to date values, and information on the lag time in valuation availability for certain assets, consult your Financial Representative. The total at the bottom of the Table of Contents page reflects the aggregate value of all assets included in this report. Valuation methodology may differ from product to product, as described elsewhere in the report and in these disclosures.

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NM may pay dividends, which are an allocation of divisible surplus to a policyowner. Each year, NM's Board of Trustees, in its sole discretion, determines whether a part of the Company's surplus can be distributed to policyowners in the form of a dividend. The NM Board decides which policies, if any, should get a dividend and the amount of the dividend. There is no guaranteed method or formula for the determination or allocation of this surplus. Accordingly, the Company's approach is subject to change. Neither the existence nor the amount of a dividend is guaranteed on any policy in any given year. Some policies may not receive any dividends in a particular year or years even while other policies receive dividends. Depending on the terms of the policy and personal choice, the dividend may be used to purchase paid-up additional insurance, used to reduce premium payments, left to accumulate at interest, or taken in cash. The dividend, if any, is payable on the policy anniversary. Dividend scale changes, loans and surrenders or withdrawals will affect policy values. Changing dividend usage on your policy may cause total insurance protection to be reduced.

The "Annualized Premiums" column values are the policy premiums payable for your policy(s) according to the Company's records, as of the last anniversary for the policy(s) and based on the premium billing frequency selected by the owner/payer. Premiums generally may be payable monthly, quarterly, semi-annually or annually per the terms of the policy and as elected by the policyowner. An additional charge is imposed if the premium is paid on a monthly, quarterly or semi-annual basis, and is reflected in the amounts shown. For more information, please visit the "Annual Percentage Rate Calculator" on our website at www.northwesternmutual.com. If a premium is not paid when due, the policy may terminate or the coverage may decrease. Accumulated values displayed may not reflect actual premium payment status. For variable contracts, the accumulated value may increase or decrease daily depending on the investment experience of the separate account(s). Actual values will be determined at the time of surrender. For universal life policies, the values shown are the reminder premium values selected by the owner/payer on an annualized basis. For details, please see your policy, and for variable policies, also see the current prospectus.

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"Accumulated value" is, depending on the contract, either the (a) policy value, or (b) the cash value plus a non-guaranteed dividend, if any, that may be paid at the time the policy is surrendered. In most situations, Net Accumulated Value is the Accumulated Value less policy debt and surrender charges, if any. A portion of the guaranteed portion of this value is also available to policyowners in the form of policy loans. The Net Accumulated Value is generally the Total Accumulated Value less any loan balance and any surrender charge. Total Accumulated Value includes the accumulated value of any paid-up additional insurance. Values displayed may not reflect actual premium payment status, and final values may be adjusted to account for unpaid premiums. For variable contracts, the accumulated value may increase or decrease daily depending on the investment experience of the separate account(s). Actual values will be determined at the time of surrender. For universal life insurance, the values shown are the Cash Surrender Values, which are the amounts payable upon surrender of the policy. The Universal Life BOLI or COLI Cash Surrender Value is payable on surrender only if all conditions of the Amendment to Cash Surrender Value Provision are met. For non-variable universal life policies, that amount is equal to the contract fund value less any surrender charge and loan. For variable universal life policies, that amount is equal to the invested assets less any surrender charge and loan. For details, please see your policy, and for variable policies, also see the current prospectus.

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