

Application

Customer: _____ DOB: _____ Today's Date: _____

1. Now, (Cust), tell me about your family dynamic. Who exactly are we protecting?

Status (circle): Single Married Unmarried Widowed Divorced

Partner/Name: _____ DOB: _____

Child: 1. _____ 2. _____

Beneficiary (to 100%): 1. _____ %: _____

2. _____ %: _____ (use back sheet for more ben./kids)

Address as it appears on ID: _____

City: _____ State: _____ Zip: _____. (circle) Rent Own

Work: (circle) W2 1099 Occupation: _____ Annual: \$ _____

2. With Health there's 5 main categories: Basic Lifestyle, your Head, your Heart, your Lungs and Cancer.

Any heart issues: Heart Attack, Stroke, Congestive Heart failure? Anything like that? What about anginas, stents or bypasses? _____

What about Cancer? Have you been diagnosed or received treatments for any kinds of cancer?

What about aneurysms, tumors, anything like that?

What about things like breathing, asthma, COPD, emphysema?

High blood pressure? (circle): Yes No High Cholesterol? (circle): Yes No Diabetes (circle): Yes No

Any nervous issues, anxiety, or depression? (circle) Yes No (if yes to any) Any hospitalization for that? Yes No

3. Height: _____ Weight: _____

Smoking or Tobacco use (circle): Yes No

Any Medical Diagnosis received (circle): Yes No

Any Prescription Medications (circle): Yes No

Type: _____ Treats: _____ (use back sheet)

Type: _____ Treats: _____

History of Procedures you've had, including surgeries (circle): Yes No _____

History of Stroke (circle): Yes No Aids/HIV (circle): Yes No

Anything Else? _____ (use back sheet)

Ever Been Convicted / or currently awaiting trial for a felony? (circle): Yes No

Active Drivers License (circle): Yes No Any DUIs or Moving Violations (circle): Yes No

Do you Bank with a Credit Union or Major Financial Institution (circle) Yes No Who: _____

4. If Phone Application / Internet Down: DON'T ASK FOR THIS OVER PHONE/ ONLY ON APP W CARRIER

City Born: _____ Drivers Lic: _____ State Issue: _____ SS # _____

Bank : _____ Check Acct #: _____ Routing: _____