

Application Resource Sheet



- Super Preferred Preferred
 Standard Modified Easy Issue
 20 Year Term

Proposed Insured: _____
First
Middle
Last

Address: _____
Street
Apt. #
City
State
Zip

Date of Birth: _____ Age: _____ Gender Male Female Height: _____ Weight: _____

Home Telephone: () _____ Email Address: _____

Primary Beneficiary Name: _____
First
Middle
Last
Relationship

Secondary Beneficiary Name: _____
First
Middle
Last
Relationship

ADB Rider Yes No \$ _____ Amount of Insurance \$ _____ Premium Amount _____

Physician Name & Address: _____

Medications & Usage: _____

APL Yes No Existing Insurance Yes No _____ Replaced or Changed Yes No
Company Name

Banking Info Checking Savings

Name on Account: _____ Bank Name: _____

Routing Number: _____ Account Number: _____

SSN: _____ / _____ / _____ Initial Withdrawal: _____ Future Draft Dates: 1st 3rd 5th 10th 15th 20th 25th

A. If there are Insurable Interest or replacement issues, refer to the application or proper replacement form.

B. When recording, refer to recording script and use the Automated Health Questions.

C. When qualifying, refer to Underwriting guidelines.

<input type="checkbox"/> <hr/> Death Benefit <hr/> Premium	<input type="checkbox"/> <hr/> Death Benefit <hr/> Premium	<input type="checkbox"/> <hr/> Death Benefit <hr/> Premium
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Notes: _____

