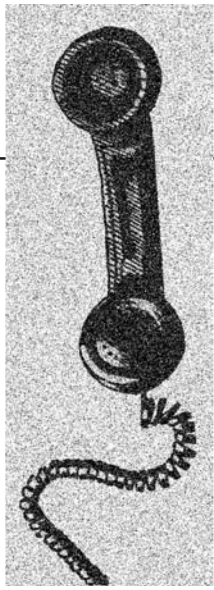

AppAssist™ Checklist

Use this list to check that your responsibilities as the person who takes the request for life insurance have been fulfilled.

- ☐ Complete the Request for Life Insurance Interview form (LP167).
- ☐ Use the Risk Evaluation Questionnaire form (LAA1237) to estimate the underwriting class.
- ☐ Don't record credit card information for interest in coverage in excess of $500,000 ($250,000 in CA) or if the proposed insured is older than age 70. ONLY THE INITIAL PREMIUM can be paid by credit card. If this is the client's preference, include the required information on request form and ask the client to sign it. Credit cards will not be drafted until the application is completed, all delivery requirements are received and the policy is issued.
- ☐ DON'T ACCEPT CASH OR CHECKS. If the client prefers to pay by check, payment will be requested when and if the application is approved.
- ☐ Be sure the client receives a copy of the "Thank You for Your Interest..." brochure so he or she understands the purpose of the Banner Call Center interview and knows what to expect from the paramed exam. The printed version (LAA1229) can be mailed or the PDF version (LAA1239) can be emailed or faxed.
- ☐ Make sure the client understands that life insurance coverage is not in force until the application is approved and the first premium and any delivery requirements have been received. Application approval is not guaranteed.
- ☐ Fax the completed form to 301-294-6960, email it to Banner-Submit@LGAmerica.com or mail it to Banner Life, 1701 Research Boulevard, Rockville, MD 20850

For copies of forms, ratecards, underwriting guidelines or customer brochures, see your general agency, your general agency website or www.LGAmerica.com.

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