

CASE SUBMISSION WORKSHEET

HAVE YOU ASKED THE PERTINENT IMPAIRMENT QUESTIONS
PRIOR TO WRITING AND SUBMITTING YOUR CASE?

IF SO, PLEASE ATTACH A COMPLETED COPY OF THE DOCUMENT -
SALES TOOL: QUESTIONS TO ASK YOUR CLIENT PRIOR TO WRITING AN APPLICATION.

IF NOT, IT IS HIGHLY RECOMMENDED THAT YOU DO SO.
IT IS IMPORTANT THAT THIS CASE IS BEING SUBMITTED TO THE PROPER COMPANY -
A SALE BECOMES MUCH MORE LIKELY IF THIS STEP IS TAKEN UP FRONT.

OTHER IMPORTANT DETAILS (PLEASE ASK THE FOLLOWING QUESTIONS):

1) IS REPLACEMENT INVOLVED?:

IF SO, PLEASE GIVE THE FOLLOWING DETAILS OF ANY POLICY BEING REPLACED:

YEAR OF POLICY:

AMOUNT OF POLICY:

TYPE OF POLICY (TERM, UL, ETC):

2) WHAT RATE CLASS AND PREMIUM WAS THE CLIENT QUOTED?:

3) IF APPROVED OTHER THEN APPLIED FOR, COULD THIS CASE BE PLACED?:

IF SO, WHAT IS THE MAXIMUM PREMIUM ALLOWABLE TO PLACE THE CASE (TO MAKE IT
WORTHWHILE FOR THE CLIENT):

IS THE CLIENT WILLING TO REDUCE THE FACE OR REDUCE THE LEVEL TERM TO FIT THE
BUDGET?

4) IS A POLICY BEING APPLIED FOR CONCURRENTLY WITH ANOTHER CARRIER?:

IF SO, PLEASE TELL US WHY IS CASE BEING DUALY SUBMITTED?:

ARE BOTH POLICIES TO BE PLACED?:

IF CLIENT WILL NOT BE TAKING BOTH POLICIES, WHAT PREMIUM ARE WE COMPETING
WITH?:

ALSO MAKE SURE THESE PERTINENT FORMS ARE ENCLOSED:

APPLICATION/ALL QUESTIONS AND SIGNATURES IN ENTIRETY

HIV FORM

REPLACEMENT FORM

ILLUSTRATION OR ILLUSTRATION WAIVER

LICENSING FORMS (IF NOT ALREADY LICENSED WITH CARRIER)

THANK YOU FOR YOUR BUSINESS!