



FAST-QUOTE REQUEST

PROPOSED LIFE CLIENT INFORMATION

NAME: _____ STATE: _____ MALE/ FEMALE: _____

DATE OF BIRTH: _____ AGE: _____ HEIGHT: _____ WEIGHT: _____

ANY TOBACCO USAGE (*please explain below*)?

TOBACCO WITHIN THE PAST 12 MONTHS Y *or* N TYPE AND AMOUNT? _____

MARIJUANA USE? Y *or* N RECREATIONAL LICENSE HOW OFTEN? _____

ANY FAMILY HISTORY OF CANCER OR CARDIOVASCULAR DISEASE PRIOR TO
AGE 60 OF PARENTS OR SIBLINGS? (*please list relationship, diagnosis age at onset, & age at death*)

ANY MEDICATIONS CURRENTLY TAKING? AND REASON? (*please list*)

ANY MEDICAL CONDITION IN THE LAST "10 YEARS" SUCH AS HEART CONDITION, DIABETES,
CANCER, ANXIETY/DEPRESSION, SLEEP APNEA, ALCOHOL/DRUG TREATMENT,
HIGH CHOLESTEROL OR BLOOD PRESSURE? EXPLAIN WITH DETAIL

ANY DUI OR RECKLESS DRIVING CONVICTION(S)? Y *or* N IF SO WHEN? _____

ANY INTENDED TRAVEL OUTSIDE THE US IN THE NEXT 24 MONTHS?

IF SO WHERE, WHEN AND DURATION? _____



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ILLUSTRATION SPECIFICATIONS

IS PROPOSED INSURED A US CITIZEN? Y or N

IF NOT, IS THE PROPOSED INSURED A PERMANENT RESIDENT IN THE US? Y or N

FACE AMOUNT: \$ _____ FACE AMOUNT: \$ _____

PREMIUM MODE _____ RATE CLASS _____

IS CLIENT WORKING WITH A MONTHLY BUDGET? Y or N IF SO, HOW MUCH \$ _____

PLEASE CHECK THE TYPE OF LIFE POLICY:

UNIVERSAL LIFE (*No Cash Value*) GUARANTEED TO AGE? (*max 120*) INDEXED UNIVERSAL LIFE (*Cash Value Policy*)

TERM: 1 5 10 15 20 25 30 35

1. RETURN OF PREMIUM TERMS: Y or N 2. GUARANTEED PREMIUM UNIVERSAL LIFE: Y or N
3. WHOLE LIFE: Y or N 4. LIFETIME SECOND-TO-DIE: Y or N
5. CHILD RIDER: Y or N 6. LIVING BENEFITS: Y or N

SELECT LIFE COMPANIES (*optional*):

TERM CARRIERS: AGLA | AIG | GENWORTH | ING/VOYA | METLIFE | NORTH AMERICAN | PROTECTIVE | TRANSAMERICA

NO EXAM CARRIERS: ASSURITY (\$350k max) | FORESTERS (\$250k max) | METLIFE (\$99k max) | TRANSAMERICA (\$99k max)

PERMANENT LIFE CARRIERS: AGLA | AIG | FORESTERS | NORTH AMERICAN

FAX OR EMAIL THE FACTS TODAY!

AGENT NAME: _____ RETURN BY FAX/EMAIL: _____

This information is requested only to assist us in providing you an accurate quote. Filling out this form does NOT constitute an application for insurance.