



Life Insurance Request for Proposal

GENERAL QUESTIONS:

Person requesting quote _____ Date of Request _____

Best time to contact client _____ Best number _____

Email Address _____

Name of person to be insured _____

Reasons or Concerns for life insurance purchase _____

Do you currently have Life Insurance in place: Type/Value/Expiration if Term _____

What value on policy: Option 1 _____ Option 2 _____

Term/Whole Life/Key Man _____

Do you have a budget for life insurance premium \$ _____

UNDERWRITING QUESTIONS:

Date of Birth _____ Male / Female _____ Smoker / Non-Smoker _____

City _____ State _____

Height _____ Weight _____

Last 10 years – Any health issues: Heart/Cancer/Cholesterol/Stroke/ _____

Note: If you are unsure what value to review we can assist in your financial profile. Knowing the budget amount is very helpful to obtain the most coverage within your budget.

COMPANY SECTION - DO NOT COMPLETE

Knowledge of the insured _____ Number of Years Known _____

Company quoted through: _____

Value: _____ Premium _____

Product: _____ Released to Insured date _____

Agent of Record: _____