

Pre-Appointment Info. Request

Please fax or email us the following form and we will begin to research appropriate carriers and plans for us to review upon our first meeting. This is completely confidential and will not be used for any other purpose. We will call you to set up a good time and location to review all the information required for you to take full advantage of your life insurance options,

To: Will Stover	From: _____
Fax: 888-822-3994	Pages: _____
Phone: 888-822-3994	Date: _____
Re: Life Insurance Quote	Phone: _____

DOB: _____ **AMOUNT OF CURRENT COVERAGE:** _____

SEX: _____ **CURRENT INSURANCE COMPANY** _____

HT & WT: _____ **CURRENT PREMIUMS AMOUNT** _____

TOBACCO USE: _____ **HOW OFTEN AND TYPE** _____

**FAMILY HISTORY OF: CANCER, DIABETES OR HEART DISEASE/DEATH? (Immediate family only)
(GIVE DETAILS)**

DO YOU HAVE MORE THAN TWO MOVING TRAFFIC VIOLATIONS IN THE PAST 2 YEARS?

ANY SIGNIFICANT MEDICAL HISTORY OR CONDITIONS?

MEDICATIONS:

HAVE YOU BEEN HOSPITALIZED IN PAST 5 YEARS? _____

DETAILS: _____

BP _____ **CHOLESTEROL** _____



Why Own Life Insurance?

Do you know what the most appropriate reasons to obtain life insurance are?

- #1: To replace the lost income for your family or pay off any outstanding debts or obligations, in the most economical manner**
- #2: To leave more of your retirement benefits to your spouse and children.**
- #3: To create more spendable income from your supplemental retirement plans such as your 401K, IRA, Deferred Comp, etc.**

This is how life insurance can benefit YOU. Which reason is most important to you, #1, #2, and #3? How about all of them?

You may have some group coverage through work, but you do not own it. The coverage is limited and normally ends when your employment ends. If you are in good health you are over paying for it. Therefore you need to determine your reasons to obtain life insurance, the correct amount, the right length of time, and accomplish this in the most economical way possible. The answers are quite simple, although very few people in the insurance industry take the time to teach you.

Our Life Insurance Specialists want to help you learn these extremely important characteristics without any obligation. Life insurance rates are based on a number of different elements, your health, habits, family history etc. Each company evaluates these elements differently. It is our job to teach you everything you need to know and to match you with the most appropriate company. Becoming a well-informed consumer is how you can get the most benefit for what you pay.

We take pride in making sure our members know that they have the right plans, for the right reasons. We encourage you to call our benefit line and set up an appointment so you can learn your individual reasons to own life insurance. The next step is for us to do the research for you, so you can reach your objective in the best economical way possible. This is how you can improve both your family's future and yours by being a well-informed consumer.

The MEA Benefits Department is administered by ILS Insurance Services: CA License # 0D36896

P: 888-217-9175

F: 888-243-3494

E: benefits@sdmea.org