



Quote Request Instructions

On computer

1. Complete the following page on your computer
2. Press F8 if you do not see the Adobe Reader toolbar
3. Print (either to your printer or a pdf print driver)
4. If you need a free pdf print driver, you can use Cute PDF

<http://www.cutepdf.com/download/CuteWriter.exe>

This program will allow you to print to a pdf file instead of to paper. You can then save it to the location of your choice and email it to us. Make sure to name it with the client name. (ie. Quoterequest_Anderson_102014) to make it easier to find later.

On paper

1. Press F8 if you do not see the Adobe Reader toolbar
2. Print to your printer
3. Complete manually. Use black pen or dark blue
4. Scan and email or fax

To email the request, send to one of the following:

Jerry Angel JAngel@empowerbrokerage.com

David Russell Drussell@empowerbrokerage.com

To fax, send to (817) 306-2357

Tips

Do not try to "save as" or save this pdf unless you have Adobe Professional or a similar program. It will not save your data. Do not try to print screen. Use the tool bar or right-click the pdf page to print it.

Then print to a pdf or to paper.

Agent Name _____ Agent Phone _____

Agent Email _____

Client Name: _____ Residence State: _____

Date of Birth: _____

Male [] Female [] Non-Tobacco [] Tobacco – What Type? _____

Height _____ Weight _____ In your opinion, should the client be rated Preferred [] Standard []

Type of Life Insurance Needed: Simplified Issue [] Fully Underwritten []

(example, Term – how long? Final Expense, IUL etc) _____

Amount of Death Benefit Needed: _____

What is the client trying to accomplish? (Death Benefit for a certain period of time, Extra Retirement Income, etc)

Any major health issues in the past 5 years? Yes [] No [] If yes, what is it, when was it diagnosed and what is the outcome?

List of Medications: (List type, frequency, dosage and what is it for?) _____

If there are more serious health issues - the type, dosage and frequency of the medications are important to finding the right solution. (With the above information we can receive a preliminary quote from an underwriter before submitting the application).

Solutions: (office use)