Client application checklist

Thank you for agreeing to discuss your life insurance needs. I will be completing your life insurance application via North American's SimpleSubmit® electronic application process. This will allow me to quickly submit your insurance application to the company and promptly schedule a medical underwriting examination in order to help get your coverage issued faster.

In order to expedite this process, it would be beneficial for you to have the following information available when we meet.

1. **Information on the proposed insured**
   - ☐ Social Security Number
   - ☐ Driver's license number

2. **Information on owner (if other than the proposed insured)**
   - ☐ Social Security Number
   - ☐ Driver's license number

3. **Information on beneficiary(ies)**
   - ☐ Social Security Number(s)
   - ☐ Birthdate(s)
   - ☐ Address(es)
   - ☐ Phone number(s)

4. **Information on existing life insurance coverage**
   - ☐ Name of carrier(s) and amount(s) of coverage

5. **Premium payment**

   Your payment options include direct bill or electronic fund transfer (EFT). Note that in order to bind coverage (subject to the terms of the Temporary Insurance Agreement), EFT payment is required. I can explain more about this when we meet.
   - ☐ Electronic fund transfer from your checking account (bring a voided check)

Thanks in advance for your assistance in making the process run smoothly. I look forward to helping you with your life insurance needs.