



# Application Checklist

- Have you given the applicant the Privacy Policy?
- Have you filled in all the information on the application – especially Social Security numbers, telephone numbers and doctor information?
- Have you included the best time to contact the applicant for phone verification? If possible, have you provided a cell phone number?
- Have you filled in the agent's report at the bottom of the application?
- Have you signed the application and included your agent number?
- If the policy is for \$10,000.00 or more, have you included a Consumer Verification Form?
- If the applicant has indicated they have other life insurance policies in force, have you included a Replacement Notice?
- If the applicant wishes to have their premiums on bank draft, have you included the correct form and a voided check?
- Have you included the full premium with the application or requested that the first premium to be drafted?