

AGENT INFORMATION							
Name					Phone		
Address					Email		
PROSPECT INFORMATION							
Name				DOB		Gender	Resident State
Website							
Income							
W-2 Employee			Self-Employed (Net income = Gross - Expenses)				
Prior Year		Prior Yr. Net			No. of employees		
Current Yr.		Curr. Yr. Net			Years in business		
Nicotine Use							
None	Cigarettes	Cigars	Chewing/Dipping		Nicotine Gum	E-cig	
How much and how often?							
Occupation							
Occupation				Yrs. in occ		Work from home?	
						% work in home?	
Duties							
Admin		Travel		Sales		Manual	Mgmt.
%		%		%		%	%
Medical History							
Condition		Date of Diagnosis		Medication/Treatment/Result			
IN-FORCE COVERAGE							
Individual Coverage				Group LTD			
Plan 1		Plan 2		LTD%	%		
Carrier		Carrier		Benefit max.			
Benefit amt.		Benefit amt.		Payer			
Payer		Payer					
DI REQUESTED BENEFITS							
Monthly Benefit		Elimination Period		Benefit Period		Additional Cost Riders	
Maximum		30 days	90 days	Age 70	10 yrs.	COLA ¹	RPP ²
Specific Amt.		60 days	180 days	Age 67	5 yrs.	FIO ³	
Payer				Age 65	2 yrs.	CAT ⁴	
BUSINESS LOAN / BOE REQUESTED BENEFITS							
Monthly Benefit		Elimination Period		Benefit Period		Additional Cost Riders	
Benefit Amt.		30 days		12 months		Residual	
		60 days		18 months		FIO	
		90 days		24 months		Salary Rplcmt.	
Loan Amount		Start Date		End Date		Monthly Amt.	
Send me the best quote				Send me multiple quotes			
Additional Information							

Fax: 817-887-5037

Direct: 817-732-7999 or 877-832-7999

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¹ Cost of Living Adjustment – increases the monthly benefit each year while on claim. Best for prospects under age 50.

² Retirement Protection – pays an additional benefit for total disability to make up for lost retirement contributions.

³ Future Increase Option – allows for increases in the monthly benefit without medical underwriting. Best for young professionals with incomes that will increase quickly over time.

⁴ Catastrophic – pays additional benefits for more serious disabilities. Adds about 5% in additional cost.