

Life Insurance...Custom Quick Quote Sheet.

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An incomplete form may produce delayed or inaccurate quotes. **Red Fields are required.**

Name: _____ Date of Birth: ___/___/___

Send quote via: ___ Email: _____ Mail ___ phone

Address to use: _____

Phone: _____ (___ hm or ___ wk)

Reason for Insurance:

- Personal: Mark all that apply.
 - Income replacement
 - Final expenses
 - Estate preservation or cover loans
 - Divorce decree requirements
 - Other _____
- Business: Mark all that apply
 - Keyman
 - Cover loan obligation
 - Buy sell or stock redemption
 - Other _____
- Trust: Estate Planning.

Who suggested coverage? *Self CPA Planner Partner Co-worker Spouse*

Personal Gross annual income: Est. Current Year \$_____ salary \$_____ bonus

___ Employee ___ Company ___ Government

___ Business ___ Owner/___ Shareholder (If yes type of business _____)

Estimated Height: _____ Estimated Weight: _____

Tobacco Status: ___ Yes ___ No ___ Never

If no when quit? _____. If yes type and frequency _____

Meds taken in the last 5 years (dosage/why): _____

Major Medical Conditions: _____

Current Coverage? ___ Yes or ___ No.

Group Plan \$ _____

Individual Policy \$ _____

Time Deadline for quote delivery: By: ___/___/___

Amount of Coverage desired: \$ _____ Premium Budget: \$ _____/month

(Not sure? See website for life insurance calculator.)

Time Period you wish to hold coverage _____ years

Type of Coverage Sought:

- Level Term: Year Level ___ 1st choice ___ 2nd choice (5, 10, 15, 20, 30 year level)
- Whole Life: Age by which you desire it to be paid up. _____
- Universal Life: Guaranteed death benefit to what age _____

For better and more accurate plan design answer as much as you can from the following page. This is not required but suggested. Answer as much as you can.

1. **Prioritize “I want a life insurance policy with...”**
 - Lowest premium avail.
 - Highly rated carrier.
 - Flexibility
 - Most cash return
2. **You currently (mark all that apply)**
 - Fully fund your retirement (i.e. 401k, IRA)
 - Have mostly non-liquid assets like real estate.
 - Have mostly somewhat liquid assets or well diversified.
 - You own your home with or without a mortgage
3. **Family Status (mark all that apply).**
 - Married
 - Significant Partner
 - Single
 - Divorced
 - Dependant children
 - Dependant family member
4. **Employment**
 - Stable in my employment
 - Somewhat unstable since industry has layoffs
 - Business has economic swings.
 - May consider a job change.
 - May consider starting my own business.
5. **Mark those which apply**
 - Hazardous job, sport or hobby
 - Travel Overseas often
 - Military
 - Many speeding tickets.
 - Bankruptcy
6. **“My financial decisions are affected by...” (rank those that apply)**
 - Tax reasons
 - Desire of spouse/partner
 - How it may enhance other things I am doing.
 - Only do what my advisors tell me
 - The economy
 - Always trying to think ahead
 - Reacting to what happened yesterday
7. **“I want coverage to...” (which two most describe you)**
 - mostly to cover my working years, but have some coverage for later in life.
 - Only to cover my working years.
 - Be available for a set term of years.
 - Be for a set term of years but also maybe available a few years extra...just in case
8. **“When it comes to insurance I get my information from..”**
 - A relative or friend
 - Planning books, magazines, etc.
 - A Planner
 - Various sources
 - Other _____
9. **“When I work with someone on financial matters I...”**
 - take my time
 - lots of information...more the better
 - like them to narrow the field and make specific suggestions.
 - I make my own decision with the data provided.
 - I know what I want...move as fast as I can.
10. **“When I work with someone I like..”**
 - To be contacted
 - Contact them only
 - Email
 - Phone
 - US Mail
11. **“If there was one thing I fear most in my finances it would be...”**
 - under funded retirement
 - bankruptcy
 - not prepared for a realistic risk
 - loss of income (disability or fired)
 - took too much risk
 - didn't take enough risk