

**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 \_\_\_ 1<sup>st</sup> choice \_\_\_ 2<sup>nd</sup> 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