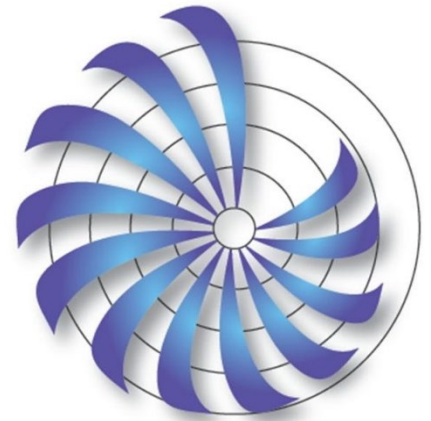


App-Solution

How to be prepared for your Upcoming insurance interview



App-Solution Date: _____

App-Solution Time: _____

Fast FAQ's

- How long will this interview take?
 - Approx. 20-30 minutes
- Will I have to have another interview?
 - It is possible you will need a short medical exam done
- What if I do not know an answer?
 - Answer the questions to the best of your knowledge
- What if I have product questions?
 - We will ask that your Insurance Agent answers those questions
- Do I automatically have insurance coverage?
 - No, not until your agent tells you the policy is in effect



Documents you will need for the interview

1. Driver's License number and Social Security Number
2. Names, addresses and phone numbers of doctors, hospitals/clinics you've visited in the past 10 years
3. Reason for and dates of medical treatment
4. Names of any prescription medicines you are taking
5. Other life insurance policies including company names, coverage amounts and policy numbers
6. Financial information including income, assets, liabilities and net worth

Reg 187 – NY STATE REGULATION

During the interview you will be asked financial questions. This is a NY State Regulation and those questions must be asked. Some common questions are:

- Current Debt (Mortgage & Credit Cards)
- Source of Funds to pay for policy
- Factors that impacted your decision to buy this product
- Risk Tolerance for investments
- Federal Tax Bracket
- Financial Obligations



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