

# 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

### Next Steps

Once the phone interview is complete, the application will be emailed to your agent to finalize the application. You and your agent will review and sign the application. Once that is done, the completed application will be sent to Specific Solutions. At that time we will begin to process the application. Once a policy is issued, we will send that to your agent to collect any money and/or signatures required.



**SPECIFIC SOLUTIONS, INC.**

*The Life, Annuity, Long Term Care, & Disability Income Problem Solvers*