

Brokerage Concepts, Inc.
Quick Quote Form

Please fax completed form to:

(610)878-9614

to the attention of:

Life Brokerage Manager

BROKERAGE CONCEPTS, INC. - QUICK QUOTE FOR DRIVING VIOLATIONS

INFORMATION GATHERED WILL BE USED IN THE EVALUATION OF THE INSURABILITY OF THE APPLICANT. OFFERS ARE TENTATIVE AND ARE SUBJECT TO VERIFICATION OF THE SUBMITTED MEDICAL EVIDENCE AND OTHER CRITERIA USED IN THE UNDERWRITING OF LIFE INSURANCE.

CLIENT: NAME _____ / [] M [] F / DOB _____ AGE _____ / HT _____ WT _____ / STATE _____
AMNT. REQUESTED \$ _____ / MAX. ANNUAL PREMIUM \$ _____ / TYPE OF INS. [] UL [] TERM YRS. LVL _____
TOBACCO USE [] NO [] YES, TYPE _____ / REPLACEMENT? [] YES [] NO / CURRENT ANN. PREM. \$ _____
LAST LIFE INSURANCE APP. YEAR _____ COMPANY _____ ACTION _____
OCCUPATION _____ / MARITAL STATUS [] SINGLE [] MARRIED [] WIDOWED [] DIVORCED
FAMILY HISTORY: AGE, IF STILL LIVING: FATHER _____ MOTHER _____ SIBLING 1 _____ SIBLING 2 _____ SIBLING 3 _____
IF ANY DECEASED, GIVE RELATION(S), AGE(S) AND CAUSE(S) _____
DRIVING RECORD: # OF VIOLATIONS IN PAST 3 YEARS _____ / # OF DUI / RECKLESS DRIVING PAST 5 YEARS _____
DO YOU EXERCISE 3 OR MORE TIMES PER WEEK [] NO [] YES, DETAILS _____
DATE OF LAST MEDICAL CHECKUP _____ / DATE OF LAST EKG _____ AND RESULTS _____
LAST BLOOD PRESSURE READING (RESULTS) _____ / _____ / ARE YOU TREATED FOR BLOOD PRESSURE [] NO [] YES
LAST CHOLESTEROL READING, HDL READING (RESULTS) _____, _____ TREATED FOR CHOLESTEROL [] NO [] YES
AGENT: NAME _____ PHONE _____ FAX _____
ADDRESS _____ CITY _____ ST _____ ZIP _____
LAI OFFICE ONLY: ENTER OFFICE NAME/LOCATION _____ FAX _____

1. LIST ALL MOVING MOTOR VEHICLE AND SPEEDING VIOLATIONS OVER THE PAST FIVE YEARS:

MONTH _____ YEAR _____
MONTH _____ YEAR _____
MONTH _____ YEAR _____
MONTH _____ YEAR _____
MONTH _____ YEAR _____
MONTH _____ YEAR _____
MONTH _____ YEAR _____

DETAIL _____
MONTH _____ YEAR _____

2. DOES THE CLIENT CURRENTLY HOLD A VALID DRIVER'S LICENSE?

[] NO [] YES PLEASE DETAIL:

STATE _____ EXPIRATION DATE _____

3. DETAIL LAST MOVING VIOLATIONS OTHER THAN SPEEDING, IF ANY:

TYPE _____ MONTH _____ YEAR _____
TYPE _____ MONTH _____ YEAR _____

[] NONE

4. DETAIL ACCIDENTS INVOLVING MAJOR PROPERTY DAMAGE, IF ANY:

DETAIL _____
MONTH _____ YEAR _____

5. WITHIN THE LAST SIX YEARS, LIST THE OCCASION AND DATE OF DRIVING UNDER THE INFLUENCE (DUI) ARRESTS AND CONVICTIONS:

MONTH _____ YEAR _____
MONTH _____ YEAR _____
MONTH _____ YEAR _____
MONTH _____ YEAR _____

[] NONE

6. HAS THE CLIENT EVER BEEN TREATED FOR SUBSTANCE ABUSE?

[] NO [] YES, PLEASE DETAIL:

MONTH _____ YEAR _____
PLACE _____

7. LIST ANY OTHER ILLNESSES OR IMPAIRMENTS, ALONG WITH ALL MEDS AND VITAMINS TAKEN, INCLUDE DOSAGE AND FREQUENCY:

