TRUST FINANCIAL SERVICES

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Case Submission Worksheet

Have you asked the pertinent impairment questions prior to writing and submitting your case?

If so, please attach a completed copy of the document –
Sales tool: *(Question to ask you client prior to writing an application)*

If not, it is highly recommended that you do so.
It is important that this case is being submitted to the proper company –
A sales becomes much more likely if this step is taken up front.

Producer Information

Date:	
Agent Name:	E-Mail Address:
Phone:	Fax:

Client Information

Name:

Rate Class Quoted: Preferred Best NS | Standard NS | Preferred NS | Preferred Smoker | Standard Plus NS | Standard Smoker

Premium:$______________

***Please include sales illustration**

Has an exam been scheduled? Yes No If yes, which service was used and provide phone #:________________________

Is replacement involved? Yes No If so, please give the following details of any policy being replaced: Year of Policy:_______ Amount of Policy: $__________ Type of Policy (term, UL, etc):__________
Is there 1035 Yes No Estimated amount $____________

Is the client willing to reduce the face or level term to fit the budget? Yes No

Is a policy being applied for concurrently with another carrier? Yes No If so, please tell us why case is being dually submitted:____

Are both policies to be placed? Yes No
If client will not be taking both policies, what premium are we competing with? $_________________

Also make sure these pertinent forms are enclosed:

Application/All questions and signatures in entirety

HIV Form/Replacement Form/Illustration or Illustration waiver

Licensing forms (if not already licensed with the carrier)

Thank you for doing business with Trust Financial Services LLC.