



TRUST FINANCIAL SERVICES

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Questions to Ask your Client Prior to Writing an Application

THINGS TO ASK PRIOR TO WRITING A CASE:

- 1) HAVE YOU HAD, OR DO YOU HAVE, ANY OF THE FOLLOWING: CANCER, HIV, HEPATITIS, HEART PROBLEMS, STROKE, MENTAL HEALTH PROBLEMS, ALCOHOLISM/DUI, DIABETES OR ANY OTHER SERIOUS DISEASE?
- 2) ARE YOU ON ANY MEDICATIONS AND WHAT ARE THEY FOR?
- 3) HAVE YOU BEEN HOSPITALIZED IN THE LAST 5 YEARS, IF SO WHAT FOR?
- 4) HAVE ANY OF YOUR BROTHERS, SISTERS, MOTHER OR FATHER PASSED AWAY PRIOR TO AGE 60? IF SO, WAS IT FROM: CANCER OR HEART PROBLEMS/STROKE? (THIS CAN AFFECT RATING, AND RULES VARY FROM COMPANY TO COMPANY).
- 5) HAS A LIVING MEMBER OF YOUR FAMILY HAD CANCER OR HEART PROBLEMS/STROKE? IF SO, AT WHAT AGE? (IF PRIOR TO 60 IT COULD BE A PROBLEM).
- 6) WHAT IS YOUR HEIGHT AND WEIGHT? - SEE SUPER PREFERRED GUIDELINES CHART, FOR APPROXIMATE QUALIFICATIONS.
- 7) HAVE YOU EVER BEEN RATED OR DECLINED FOR INSURANCE, AND IF SO, WHAT ARE THE DETAILS?
- 8) DO YOU PARTICIPATE IN ANY SPECIAL ACTIVITIES (AVIATION, SCUBA, ROCK CLIMBING, MOTORCYCLE RACING, ETC) OR RECENTLY TRAVELLED TO A FOREIGN COUNTRY OR HAVE CURRENT PLANS TO DO SO? DETAILS AND QUESTIONNAIRES SHOULD BE FILLED OUT IF SO AND PRE-SHOPPED FOR BEST CARRIER BEFORE TAKING AN APPLICATION.

PLEASE RUN ANY ISSUES THAT COME UP BY US *BEFORE* WRITING A CASE!

*PLEASE FAX A COPY OF THIS DOCUMENT WITH APPLICABLE DETAILS ADDED
TO YOUR CASE MANAGER - PRIOR TO WRITING YOUR CASE.
OR CALL YOUR TRUST FINANCIAL SERVICES ACCOUNT EXECUTIVE TO DISCUSS.*

THEN... WRITE AND SUBMIT YOUR CASE WITH THIS FORM AND
THE COMPLETED CASE SUBMISSION WORK SHEET ATTACHED.

Thank You for Doing Business with Trust Financial Services LLC.