



NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

PHONE: \_\_\_\_\_

PLEASE MARK ALL PRODUCTS YOU WOULD LIKE TO DISCUSS IN YOUR APPOINTMENT TODAY:



**LIFE INSURANCE**

- Term Life (1, 5, 10, 15, 20, 25, 30, 35, & 40)
- Universal Life (UL, GUL, IUL)
- Whole Life (Final Expense, Traditional)



**Annuities**

- 401k Rollover
- Retirement Planning
- Safe Money Accounts (Upside, Potential, w/o the Downside Risk)



**Hospital Indemnity Plans**

- Reimburses for Hospital Stays, Ambulance, Emergency Room, etc.



**Long Term Care**

- Nursing Home, Home Health Care,



**Assisted Living Facility**

- Hybrid LTC/ Life Insurance



**Critical Illness**

- Cancer, Heart Attack, Stroke, etc.



**Health Insurance**

- On/ Off Exchange
- Short Term Medical
- Christian Health Share
- Group Health



**Medicare Supplements**

- Plan G – Pays 100% of Medicare Approved Charges After Part B Deductible
- NO Networks



**Medicare Advantage Plans**

- Most Plans are Zero Premium • Extra Benefits (Dental, Vision, Hearing, OTC, Gym Membership, etc.)
- Network Based
- Plans Vary Based on Country



**Prescription Drug Plans**

- Plans Vary Based on Country and Prescriptions



**Disability**

- Individual
- Business Overhead Expense Coverage
- Key Employee



**Dental, Vision, Hearing**

- Can be Individual or Combined Together



**Employee Benefits**

- Life, Accident, Hospital, Cancer, etc.



**Business Owners**

- Buy Sell Agreement
- Business Succession Planning
- Key Employee Coverage



**Accidental Medical / Accidental Death**

- Benefits Paid in the Event of an Accident



**Funeral & Burial Plans**

- Final Expense Planning
- Burial, Cremation and end-of-life-benefits



**Mortgage Protection Insurance**

- Mortgage Protection Plans
- Mortgage Payment Insurance
- Living Benefits – Critical, Chronic and Terminal Illness