



The Morrison Agency

FROM START TO FINISH

Life Insurance Intake Form

- Name?
- Gender?
- On a scale from 1-5, what is your health status?
- Nicotine or Cannabis? (Never, Previously, or Currently)
- Height/Weight?
- Date of Birth?
- Insurance Coverages? Term/Return of Premium/Permanent Insurance/Supplemental Retirement Income/Whole Life/Long Term Care/Accidental Death
- Death Benefit amount? (\$50,000-\$10,000,000)