

Designs In Life Application Submission Checklist

This form must be submitted with all applications

Agent Name (please print clearly) _____

Your E-mail Address (please print clearly) _____

Plan Information - Please make sure you indicate the type and name of the plan of insurance on the application as well as the premium mode you proposed. Please submit a proposal if available.

Premium Information - Please indicate below the underwriting class and premium you proposed to your client. **THIS INFO WILL NOT BE SUBMITTED TO THE INSURANCE COMPANY. IT IS FOR OUR INTERNAL USE ONLY.**

Underwriting Class _____ Premium Proposed \$ _____ Mode _____

Pre-application Inquiry? - Did you discuss this case with anyone at Designs In Life before taking this application? If so please complete the following.

I discussed this case with _____ UW Class Offered _____

Proposal - Please submit any proposal you used in the sales process which correlates with what has been applied for on this application.

Proposal is included **No proposal was used in the sales process**

Exam - Have you ordered the exam? If you have, please have your examiner send the results to Designs In Life, 5865 Traffic Way, Atascadero, CA 93422. If you have not ordered the exam, we are happy to do it for you. Please indicate:

I have ordered the exam **Please order the exam for me**

Application Medical Questions - Many of our companies require that the agent complete the medical questions on the application. Agents sometimes bypass this section because health questions will be asked on the paramed exam. This sometimes causes the application to be returned to the agent and slows down the underwriting process. Many companies do allow this section to be left incomplete if an exam is being completed, however **we do not recommend this practice.** If the initial application lacks this information it may cause a delay in ordering medical records and may keep you and us from recognizing a potential underwriting problem early on in the process.

Company Appointment - Are you appointed with this company? If you are, please make sure your agent number is on the application. If you are not appointed, you must submit your contracting paperwork with the application. Be sure it is dated prior to the application date. If you need contracting paperwork please e-mail us at shannon@designsinlife.com we will fax or e-mail you the necessary forms. You can also find agent appointment paperwork for most companies on our website at www.designsinlife.com.

Mailing Applications - Mail all applications and underwriting requirements to

Designs In Life
5865 Traffic Way,
Atascadero, CA 93422

Case Status - Current and comprehensive case status for all of the cases you have submitted through Designs In Life can be found on the CaseTrak page of our web site: www.designsinlife.com. You will need a user name and password to access this page. **Please call us at 800-990-9993** after you have submitted your first application to receive your confidential access codes.