



ASSURITY® LIFE INSURANCE COMPANY
(402) 476-6500 • (800) 276-7619 • FAX (877) 864-6630
ASSURITY® LIFE INSURANCE COMPANY OF NEW YORK
(844) 401-7585 • FAX (877) 864-6630
Admin. Office: P.O. Box 82533, Lincoln, NE 68501-2533

AGENT CHECKLIST FOR ILLUSTRATION

Applicant's name _____ Resident state _____ Date of birth ____/____/____
Benefit amt. Elimination Benefit period

Do you have disability income now (including coverage through an employer) with another provider? ☐ Yes ☐ No _____

Have you ever filed for bankruptcy? _____ Date ____/____/____

Job duties (be specific) _____

W2 employee or self-employed? _____ If W2 employee, list monthly income \$ _____

If self-employed: For how long? _____ What percentage of the company do you own? _____

How many employees are employed by the business? _____

Do you work out of your home? ☐ Yes ☐ No If YES, what percentage of time do you work from home? _____

Taxable earned income for this year \$ _____ Last year \$ _____

Height ____ft. ____in. Weight _____ ☐ Male ☐ Female

Has the Proposed Insured had a change in weight of more than 10 pounds this past year? ☐ Yes ☐ No

Has the Proposed Insured ever used any form of tobacco or nicotine-based products, or substitutes such as patches or gum? ☐ Yes ☐ No

If YES, please list type _____ amount per day _____ last date of use ____/____/____

Are you currently taking any prescribed medications, or in the past three years have you been prescribed any medications? ☐ Yes ☐ No

Medication	Daily Dosage	Date Originally Prescribed

Back and/or neck problems? ☐ Yes ☐ No Chiropractic treatment? ☐ Yes ☐ No Last date seen ____/____/____

Have you ever participated in a sleep study, been diagnosed with sleep apnea or other respiratory disorder, or ever used a c-pap machine? ☐ Yes ☐ No

Diabetes? ☐ Yes ☐ No ☐ Type I ☐ Type II Age at onset _____

Hypertension? ☐ Yes ☐ No Date of diagnosis ____/____/____ Last reading _____, date ____/____/____

Skin cancer or tumors? ☐ Yes ☐ No Type and location _____ Last treatment date ____/____/____

Drug and/or alcohol abuse? ☐ Yes ☐ No Type of drug _____ Amount of alcohol _____

Treatment dates _____ Involvement in support groups ☐ Yes ☐ No Which? _____

Have you had a natural parent or sibling who was diagnosed with or died of cancer, heart disease or diabetes prior to the age of 60? ☐ Yes ☐ No

If YES, list relationship, diagnosis and age of diagnosis. _____

Other medical history:

--

Elimination period requested _____ Benefit period requested _____

Agent's name _____ Phone no. _____ Email _____

Assurity is a marketing name for the mutual holding company Assurity Group, Inc. and its subsidiaries. Those subsidiaries include but are not limited to: Assurity Life Insurance Company and Assurity Life Insurance Company of New York. Insurance products and services are offered by Assurity Life Insurance Company in all states except New York. In New York, insurance products and services are offered by Assurity Life Insurance Company of New York, Albany, New York. Product availability, features and rates may vary by state.