



Tips to prepare for your SwiftApp phone interview

Thank you for your interest in life insurance coverage. Please read through the following information so you know what to expect and can feel prepared during the application process. The interview should take about 10-15 minutes.

During your confidential interview, you should have the following information available:

- Personal Info
 - Social Security Number
 - Driver's license number
- Information for all Beneficiaries
 - Full name
 - Social Security Number
 - Address
 - Date of birth
 - Telephone number
 - Relationship to the insured
 - Percentage of Funds to each insured
- Personal Financial information
 - Earned income
 - Spouse earned income
 - Net worth
- Existing insurance information
 - Carrier name
 - Policy number
 - Issue Date
 - Face Amount
 - Will you be replacing or keeping the old policy?

Once the interview is completed, the application will be input into our system and emailed to you via DocuSign for signatures. As soon as we receive the signatures, your application will be sent to our process team to go to the carrier.

The next step will be completing your exam that we will order as soon as your interview is done.





Tips to prepare for your exam

The medical exam can take place at your home, workplace, or a patient service center.

There is no cost to you for the exam.

Prior to your exam:

- Get a good night's sleep
- Avoid drinking alcoholic beverages for at least 8 hours
- Do not smoke or drink coffee for at least 1 hour before your appointment
- Drink a glass of water 2 hours prior
- Try not to eat any food 2 hours prior. If at all possible, fast for 12 hours
- Advise the paramedic of any medication(s) you are taking
- Skip heavy exercise on the day of your exam
- Wear comfortable, loose fitting clothing

Once the exam is completed, the paperwork will be automatically forwarded to the insurance carrier for review. Your agent will be in contact with you if any additional information is required to complete your life insurance application. He or she will be in contact with you once an underwriting decision has been made. Should you have any questions throughout the process, your agent will be your best point of contact.