



BRINGING SIMPLE TO LIFE™

**Congratulations on your decision
to include Insurance within your financial portfolio!**

Now that you have shared your initial information, the next step will be for a colleague from our LifeEase Insurance Support team to reach out to you at a date and time you specify to complete the application and set up a date for your exam (if applicable).

Our LifeEase Team is a premier group of insurance professionals who are expert at expediting the insurance acquisition process and advocating on your behalf to get you the very best offer available. It's an easy three-step process:

Insurance is as easy as 1, 2, 3 !

1. The Interview: You will receive one or perhaps several phone calls to complete the application, confirm health and lifestyle questions, and arrange for a medical examination. It may feel like some of these questions are repetitive and indeed, some are that way by intent. Please understand this is a necessary part of the process.

2. The Paramedical Exam: If an exam is required, please be prepared to:

- ✓ Review and sign your application.
- ✓ Provide information on existing life insurance you already own: including the name of the carrier, policy number, issue date and amount of coverage.
- ✓ Provide the Date of Birth and Social Security number of your beneficiaries.

The exam typically takes less than an hour. The examiner is a professional and is there to help you do well. We'll share some helpful tips in a separate email.

3. Policy Review and Delivery: Once underwriting is finalized and you've been approved, you'll receive a call from us to review and deliver your policy.

It's that easy!

Additional Notes:

- Underwriting will take approximately 30 to 45 days from the time the exam has been completed, depending on how quickly your doctor's office provides the requested medical history. The LifeEase team will do everything possible to speed this process along, and will coordinate with us so we can provide you with periodic updates via phone and email.
- If you have any questions, please don't hesitate to call our office or the LifeEase™ Client Services Team at (855) 437-1090, extension 246. Thank you!