A resource for brokers

Guardian®

Illustration Request Form

Broker's information:

Name: _____ Phone Number: _____

Address: _____ Email Address: _____

City: _____ State: _____ Zip: _____

Client's information:

First Insured

Name: _____

Date of Birth: _____

State: _____

Desired Underwriting Class: _____

Second Insured

Name: _____

Date of Birth: _____

State: _____

Desired Underwriting Class: _____

Case objective: (Provide an outline of the case. For example, if using whole life or universal life, please specify if full pay or natural offset, and/or cash value desired at a specific age, etc.)

Competition: (Please provide the name of the carrier, product name, and copy of the illustration to ensure comparable options.)

Plan desired:

Whole Life: _____ Universal Life: _____ Term Life: _____

Face Amount: _____ Premium Amount: _____ 1035 Amount: _____

Riders/special instructions: (Include all riders, additional PUA premium, term blends, years to pay, income stream, specific cash values, etc.)

Pre-qualifying your client

Tobacco use:

Non-smoker ☐ Smoker ☐ Chewing tobacco ☐ Pipes/Cigars ☐ E-cigarettes ☐

Current use of medication:

Please list the names of all medications, the dosage, the reason of usage, and how long the medication has been used.

Medical history:

Please check the box that is relative to this case.

- ☐ Diabetes I or II
- ☐ Neurological Disorders
- ☐ Cardiovascular
- ☐ Cancer
- ☐ Sleep Apnea (Mild, Moderate, Severe)
- ☐ Depression/Anxiety/Bipolar/Other Mental Disorders
- ☐ Blood Disorders
- ☐ Autoimmune System
- ☐ Elevated PSA
- ☐ Gastrointestinal
- ☐ Alcohol/Drug History
- ☐ Migraines
- ☐ Other

Remarks:

Any questions that were answered "Yes" please include all details including year of diagnosis, stages, number of lymph nodes involved (if applicable), the form(s) of treatment(s), and the results of the most recent follow ups.

Avocation activities:

- ☐ Scuba Diving
- ☐ Mountain Climbing
- ☐ Race Car Driving
- ☐ Pilot
- ☐ Sky Diving

Remarks:

Any questions that were answered "Yes" please include all details.

The Guardian Life Insurance Company of America

guardianlife.com

New York, NY

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