



The Shaw Assist program is quick and easy, and we created the list below to help you prepare for our interview with you. Please have this information available when we call to ensure your application can be fully completed and ready for carrier review.

## Medical Information

- Names, addresses, phone numbers of doctors or facilities you have visited within the last 5 years
- Reason for visits
- Result of visits
- Any prescriptions you are currently taking (name, dosage and frequency), reason you are taking the medication and who prescribed the medication



Helpful tip: Take a picture of your prescription bottles. This can also help in an emergency especially when you are traveling.

## Beneficiary Information

- Name, date of birth, address, phone number, email address and social security number



Helpful tip: Many people like to add their children as contingent beneficiaries but don't have access to their social security numbers. Remember you can always add a contingent beneficiary later when you do have this information.

## Existing Insurance

- We will need the carrier name, face amount, date issued, policy number and beneficiary's name(s)



Helpful tip: If you can't locate your insurance policies, look through your bills or bank statements which may have your policy number on them or contact the carrier or your advisor.

## Business Information

- If this is a business owned policy, the business Tax ID #, assets, liabilities, gross sales, net income after taxes and fair market value of business or a copy of the business' profit and loss statement
- Date business was established, percentage of business owned, any bankruptcy information, company web address



Helpful Tip: Carriers can provide coverage in addition to personal insurance when your business is the beneficiary. Limits include up to 10 times your salary for Key Man insurance or your value of ownership in the corporation for Buy-

Sell/Stock Redemption or 80% of debt you have signed off on for the benefit of the corporation.

## Personal Financial Information

- Estimated annual income and net worth



Helpful tip: There are general guidelines for the financial multiples expected for personal coverage and business coverage, and here is a sample from one company for earned income. Make sure your estimated income meets the insurance guidelines, below is a sample showing Prudential's guidelines, other carriers are very similar to these.

### Prudential's Income Guidelines

Ages	Income		Factor		Amount of Insurance
Up to 40	\$	x	35	=	\$
41-50	\$	x	25	=	\$
51-60	\$	x	20	=	\$
61-70	\$	x	10	=	\$
71-80	\$	x	5	=	\$

Example: You are a 30-year-old that makes \$60,000 annually.

$\$60,000 \times 35 = \$2,100,000$  You would be eligible to get up to \$2,100,000 of insurance

## Contact Us:

**Marketing Specialist's Name**  
**(502) 583-5527 or (800)626-5888**  
**Email Address**