

Shaw American Helpful Tips to Prepare You for Your Life Insurance Interview

ANY QUESTIONS?

Call Shaw American Financial Corporation (502) 583-5527, (800) 626-5888 or your advisor

Shaw American looks forward to helping you apply for life insurance. On behalf of your life insurance advisor, a Shaw American team member will call to interview you to begin your life insurance application. When you receive the completed application and policy, please review them carefully for clerical errors.

We know you would like to complete the interview as quickly as possible, and, in order to do that, we created the list of required information and tips below to prepare you for the call since some of the information we ask for can be a little tedious and troublesome to collect. Don't worry if you don't have all the answers, the most important thing is to get the application process started; we can get the rest of the information later.

Medical Information

- Doctor or hospital visits in the last five years (approximate dates, reasons and results)
- Prescriptions you are currently taking (prescribing doctors, dosages and frequencies)

Helpful tip: Take a picture of your prescription bottles before the interview.

Beneficiary and Contingent Beneficiary's Information

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

Helpful tip: Many people don't have their contingent beneficiary's information. A contingent beneficiary is not necessary to apply, and they may be added later when the information is available.

Existing Life Insurance

- Carrier name, face amount, date issued, policy number and beneficiary's name(s).

Helpful tip: Your advisor may have this information or can get it for you.

Business Information (only required for business owned policies)

- 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. Arrangements can be made for this information to be submitted directly to the insurance carrier if you wish.
- Date business was established, percentage of business you own, company's web address

Personal Financial Information

- Estimated annual income from prior year tax return and estimated net worth (assets minus liabilities).

Thank you for taking the time to prepare for your life insurance interview.