

Principal Digital App Questions

Proposed Insured:

Client Name _____ Gender _____

Date of Birth _____ Tobacco? _____ Social Security Number: _____

Rate Class? _____ Face Amount _____ Length of term _____

Street Address with Zip Code:

Best Telephone Interview Number _____

Email Address _____

Is insured the owner? _____ (If no, need name of individual or company owner.)

If No: Name of Owner _____ Relationship to Insured _____

Other Owner Email Address: _____ Does Owner have existing Insurance? _____

If so: Company: _____ Face Amount _____

Beneficiary Information:

Name: _____ Relationship to Insured: _____
Primary Beneficiary ___ Contingent Beneficiary ___

Name: _____ Relationship to Insured: _____
Primary Beneficiary ___ Contingent Beneficiary ___

Plan Information:

Mode of Premium: _____

Any riders _____

Any current life insurance policies in-force? If so, need company name and face amount:

Company: _____ Face Amount _____ Replacing? _____

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Company: _____ Face Amount _____ Replacing? _____

Agent name _____

What to Expect

from your

Life Insurance Interview



**Give or Email to
Your Client!**

Good for you! You've made the important decision to apply for life insurance. Now that your application has been started, here's what's next.

You'll need to complete a life insurance interview. Most insurance companies do this over the phone with you, and some offer an online option for you to complete on your own.

Below is information that will help you prepare - regardless of which process you go through.

General Information

- Information to verify your identity; such as your social security number, driver's license number (and history of violations) and other demographic information
- Citizenship documentation (*if applicable*)

Other Life Insurance

- Information about any other life insurance policies you have; including insurance company names, policy numbers and coverage amounts

Health and Medical Information

- Height, weight and any fluctuations
- Names, addresses and phone numbers for all current doctors and clinics
- Names and dosages of current prescriptions or over-the-counter medications
- Medical history; including details for medical conditions, date of diagnoses, treatments, results of treatments, and any procedures/surgeries performed
- Family health history for parents and siblings, including major diagnoses such as heart disease or cancer and ages/causes of death (*if applicable*)

Financial Information

- Earned and unearned income
- Total net worth, including property
- Assets and Liabilities
- Employment information
- Banking information (*optional if you wish to pay premiums with automatic deductions*)

Lifestyle Information

- Information about exercise habits, travel, and any high-risk activities such as sky diving, hang gliding, scuba diving, rock climbing, aviation, racing, etc.
- Information about smoking, drinking habits, and drug use.