

Request For Application

This is NOT an application for life insurance. It is a request to initiate the application process only.
FAX to 818.264.2359 ATTN: Richard Hall or Scan to richard.hall@capitasfinancial.com

SVP Name: _____

Insured

Primary Insured: _____ D.O.B: ____/____/____ ☐ Male ☐ Female (Phone): _____

Second Insured: _____ D.O.B: ____/____/____ ☐ Male ☐ Female (Phone): _____

Address: _____ City: _____ State: _____ Zip Code: _____ Email Address: _____

Notes/Travel, Hobbies, Language etc. _____

Time to Call – between 9:00 am and 4:00 pm weekdays (48 hour minimum notification time during work week)

Insured

Preference #1 Time: _____ Date: _____ Day: ☐ Mon ☐ Tues ☐ Weds ☐ Thurs ☐ Fri
 (Indicate Hour A.M. or P.M. – 15 minute time frames please.)

Preference #2 Time: _____ Date: _____ Day: ☐ Mon ☐ Tues ☐ Weds ☐ Thurs ☐ Fri
 (Indicate Hour A.M. or P.M. – 15 minute time frames please.)

Number to call: ☐ Home ☐ Work ☐ Other: _____ **Special Instructions:** _____

Coverage Information – Request must be accompanied by as-sold illustration

Carrier: _____ Face Amount \$ _____ Product: _____

Proposed Premium: \$ _____ Premium Mode: ☐ Annual ☐ Monthly ☐ Quarterly ☐ Semi-Annual State of Issue: _____

Term: ☐ 10 Year ☐ 15 Year ☐ 20 Year ☐ 25 Year ☐ 30 Year ☐ ROP: ____ Year Rate Class quoted: _____

Permanent: ☐ Universal Life ☐ Whole Life ☐ Index UL ☐ Variable Life ☐ LTC Rider ☐ Last Survivor

Will new insurance replace any in-force insurance? ☐ Yes ☐ No **If a 1035 exchange please provide inforce information**

Ownership: __ Individual __ Business __ Trust (__ Trust to be established/ __ Trust is already established)

Notes: _____

Financial Advisor Information

Financial Advisor Name: _____ Firm: _____ Email: _____

Branch City : _____ Business Phone (_____) _____ - _____

Licensed in: _____ Licensed in State of Insured ☐ Yes ☐ No **Advisor Appointed with Carrier & PSF:** ☐ Yes ☐ No

Date: _____

I hereby authorize Pacific Southwest Financial to contact the above mentioned individual at the requested time to call. This is not an application for life insurance coverage. Signing or completing this form will in no way serve to create or commence life insurance coverage. Signing or completing this form does NOT mean that coverage is effective.