

## AGENT FORMS/ MATERIALS ORDER SHEET

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ Apt/ Suite: \_\_\_\_\_

CITY: \_\_\_\_\_ ST: \_\_\_\_\_ ZIP CODE \_\_\_\_\_

PHONE: \_\_\_\_\_ DATE: \_\_\_\_/\_\_\_\_/\_\_\_\_ AGENT # \_\_\_\_\_

**General Forms**

Preauthorized Bank Draft Withdrawal
DIRECT DEPOSIT AGREEMENT <b>CHECK:</b> <input type="checkbox"/> 1-Time <input type="checkbox"/> Recurring
Replacement Form - Life & Annuity
Transfer. Rollover, 1035 Exchange Form

**Life Applications& Forms**

LIFE APPLICATION
LIFE APPLICATION (Short) <b>CHECK</b> <input type="checkbox"/> IL <input type="checkbox"/> OH <input type="checkbox"/> PA
FINAL EXPENSE
ACCIDENTAL DEATH & DISMEMBERMENT

**Annuity Applications & Forms**

ANNUITY APPLICATION
<b>ROTH IRA:</b> <input type="checkbox"/> ENDORSEMENT <input type="checkbox"/> DISCLOSURE
<b>TRADITIONAL IRA:</b> <input type="checkbox"/> ENDORSEMENT <input type="checkbox"/> DISCLOSURE

**Life Sales Materials**

REPRESENTATIVE LIFE GUIDE
POCKET UNDERWRITING GUIDE
10 PAY - RATE CARD
20 PAY - RATE CARD
FREEDOM TERM - RATE CARD
HIGH CASH VALUE - RATE CARD
SINGLE PREMIUM -RATE CARD
WHOLE LIFE - RATE CARD
FINAL EXPENSE - RATE CARD

**Annuity Sales Materials**

REPRESENTATIVE ANNUITY RATE SHEET
REPRESENTATIVE ANNUITY GUIDE

**Annuity Brochures**

3 YEAR
5 YEAR
FLEX ONE
FLEX TWO
BONUS ONE
BONUS TWO

**Life Brochures**

FINAL EXPENSE BROCHURE <b>LIMIT OF 10</b>
FINAL EXPENSE, EXAM ONE INTERVIEW FLYER
FREEDOM TERM
HIGH CASH VALUE
SINGLE PREMIUM
STUDENT TERM
WHOLE LIFE
TERM-TO-30

**Agent Tools & Materials**

2016 COMPARATIVE REPORT
COPY OF KSKJ VOICE NEWSPAPER
NEW BUSINESS PINK ENVELOPE
APPLICATION FOR MEMBERSHIP - <b>PA ONLY</b>
ANNUAL REPORT <b>LIMIT OF 5</b>
MEDICARE SUPPLEMENT INSURANCE BROCHURE
BUSINESS CARDS (LIMIT OF 20) *SPECIAL ORDER FOR MORE, YOU MAY BE REQUIRED TO PAY*

**Member Service Forms**

ANNUITY OWNER CHANGE REQUEST
CHANGE OF NAME/ADDRESS
CHANGE OF BENEFICIARY
ASSIGNMENT OF LIFE INSURANCE
CHANGE OF OWNER
REQUEST FOR CHANGE OF AGENT