Life Application Checklist

Use this checklist to ensure efficient processing of your Life business.

- [ ] Be sure to complete the entire application — sign and date all necessary places
- [ ] Include all pages of application
- [ ] Answer all questions that apply
- [ ] Include all medical information:
  - [ ] Visits and consultations
  - [ ] Diagnosis, treatments and outcomes
  - [ ] Prescriptions and duration
  - [ ] Physician's contact info (clinic, address and phone number)
- [ ] Replacement / 1035 exchange paperwork — NEED ORIGINALS
- [ ] Checks — Include correct paperwork for accepting money with application, temp insurance agreement, etc.
- [ ] Paramed — Please indicate on application or advise case manager as to who will order: RZFN or Agent
- [ ] Confirm that appointment with the carrier is in place before application submission. If not, please send with application. Make sure all requirements are included:
  - [ ] State license
  - [ ] Voided check
  - [ ] E&O insurance
  - [ ] AML certificate
- [ ] Place any originals or checks in the mail. Your case manager will scrub the application and send it directly to the carrier to start processing — originals to follow via email

Your Life Case Manager assigned to all of your Life business:

Traci Prewitt
tprewitt@rzfnetwork.com
888.849.8096

Submitting a life application:

Email: *tprewitt@rzfnetwork.com*

Fax: 763.295.8110
(attn: Life New Business)

Mail: RZ Financial Network
4134 Deegan Ct. Ste 300
Monticello, MN 55362

RZ Financial Life Solutions Network

888.849.8096 **www.rzfnetwork.com**