

NEW BUSINESS TRANSMITTAL CHECKLIST

Date Submitted: _____

Agent's Name: _____

Client's Name: _____

Agent Contact information for Case Status / Updates. (Please check box beside preferred method of contact)

Name (if other than Agent): _____

Telephone: _____

Email: _____

Fax: _____

Exam and Labs Requirements. (Have exam and labs requirements been ordered, scheduled and/or completed?)

Attached with application

Netstreet Brokerage to order exam/labs for my client

Ordered by Agent Agent will provide paperwork to Netstreet Brokerage upon completion of requirements
Netstreet Brokerage to obtain paperwork from Exam Company upon completion of reqs

Exam Scheduled: _____
Exam Date Exam Company Name Exam Company Telephone

Risk Class and Premium Quoted. (What risk class and premium did you quote your client?)

See attached Illustration for Risk class and Premium quoted

See attached Quick Quote/Informal offer for Risk class quoted

Quick Quote/Informal Details: Offer provided by: _____ (Name of Netstreet Brokerage Associate)
Tentative Risk Class: _____ Tentative Premium: \$ _____

Risk class needed to place case _____

No Risk class or Premium quote was presented to my client

Check all that apply to this case. (Please provide case details to help ensure all required forms have been submitted)

Replacement of existing life insurance or annuity

1035 Exchange Approximate value \$ _____

Backdate to Save Age OR Special Date requested ____/____/____

Trust Ownership

APS attached (Facility/Doctor) _____ (Facility/Doctor) _____

Notes / Comments / Special Requests.

For Internal Purposes Only

Date Completed: ____/____/____

Case Manager: _____

Recruiter: _____

Licensing: Ready to Submit Hold for Agent Contract

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