



## Live App™ / E-Signature Client Info Sheet

**STEP ONE:** Provide your Advisor with the following information:

- Best telephone number to be reached at
- Email address
- Available dates and times for over the phone application completion (please allow for a 30 minute phone call)

**STEP TWO:** Gather the following information to prepare for your Live App Appointment:

- Drivers License Number and State of Issuance**
- Policy specifics of other Disability Insurance whether applied for or inforce**

- Name of company
- Type of coverage (group or individual)
- Benefit amount (base amount or percentage of your income)
- Elimination Period and Benefit Period
- Who pays the premium? (ie employer or yourself)
- Is this coverage going to be replaced by the new policy you are applying for?

**-Medical History Information**

- Contact information for all doctors seen within the past 5 years
  - Name
  - Address
  - Phone number
- Details for all visits
  - Approximate date
  - Reason for visit
  - Findings, treatment, and medications prescribed including dosage and usage

**-Income Information**

- Be able to provide income amount for the past 3 years
- If you are self employed please provide the **net** income amount for the past 3 years

**STEP THREE:** Live App Operator will call you at the date and time requested in STEP ONE to complete the application. At this time you will be given a password that will be needed to complete your electronic signature. Please keep this password in a safe place.

**STEP FOUR:** After the Live App call, you will receive the documents via email for your electronic signature.