



# Live App™ Appointment Request Form

Proposed Insured's Full Name: \_\_\_\_\_

**A Live App Operator will contact you at the time requested below to complete your Disability Insurance application. Appointments must be scheduled between 8:30AM and 4:30PM Central Time**

Best day(s) to call:     M     T     W     Th     F

Best time(s) to call: \_\_\_\_\_ Time Zone: \_\_\_\_\_

Best phone number: \_\_\_\_\_  Work     Home     Cell

Email Address: \_\_\_\_\_

Advisor Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

**Indicate Coverage(s) Applying for:**

Disability Income                      Carrier: \_\_\_\_\_

Overhead Expense                      Carrier: \_\_\_\_\_

Disability Buy-Out                      Carrier: \_\_\_\_\_

DI Retirement Security                      Carrier: \_\_\_\_\_

DI Key Person                      Carrier: \_\_\_\_\_

DI Business Loan Protection                      Carrier: \_\_\_\_\_

Are commissions to be split on this case?     YES     NO

If YES, what is the name of the other agent and what is the percentage split? \_\_\_\_\_

**A COPY OF THE PROPOSED INSURED'S SOLD PROPOSAL(S) MUST BE INCLUDED WITH THIS FORM IN ORDER TO PROCESS THE APPLICANT THROUGH THE DRG LIVEAPP SYSTEM.**

By signing below I certify that the client understands the coverage presented to them and has committed to the attached plan design. I also certify that the client is aware and understands that a DRG LiveApp representative will be contacting them in order to help facilitate the application process.

Advisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Please send this completed form with a copy of the sold proposal(s) via email to [liveapp@drghi.com](mailto:liveapp@drghi.com) or by fax to 773-725-7828. Please do not hesitate to contact us directly at 800-945-9719 Ext. 304 or 305 with any questions.**

**FOR INTERNAL USE ONLY**

LiveApp Operator: \_\_\_\_\_ Password Given: \_\_\_\_\_

Call Date: \_\_\_\_\_  
VM                      Performed LiveApp                      Scheduled (Date & Time) \_\_\_\_\_

Call Date: \_\_\_\_\_  
VM                      Performed LiveApp                      Scheduled (Date & Time) \_\_\_\_\_

Call Date: \_\_\_\_\_  
VM                      Performed LiveApp                      Scheduled (Date & Time) \_\_\_\_\_