

Large Case Informal

Use this template to submit an Informal Request to Underwriting for review.

Guidelines:

- Term product – minimum face amount of \$5 million, max of \$25 million
- Permanent product – minimum face amount of \$2 million OR \$25K premium, max of \$25 million
- Age 65 and under
- HIPAA required
- We will review cases within our COVID guidelines

Send fully packaged informal to informals@sfgmembers.com via secure email.

1. In the subject line type in this format: [Secure]
2. Then type the subject title after [Secure]

Requirements needed:

- Signed HIPAA
- Please provide additional information of any unique situations or history to assist in the overall review
- APS / Financial History / Medical Records (such as an MD summary or actual copies of the doctor records) for review

Client Information:

Name:

Age:

Gender:

City:

State:

Case Design:

Face Amount:

Premium:

Total inforce applied for:

Any pending applications:

List any prior informal submissions and/or offers made:

Case summary:

Medical History:

Financial History (if applicable):

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