

APPLICATION PRINTING CHECK LIST

1. Print and review this document with your manager **BEFORE** printing applications.
2. After completing, take a photo of this document and text it to your manager.

Completed	Print Yes/No	Carrier	Product	Product Type
	<i>NO</i> <i>e-app only</i>	<i>Americo</i>	<i>HMS 125 & HMS CBO</i>	<i>Term / Cash Back</i>
	<i>NO</i> <i>e-app only</i>	<i>Americo</i>	<i>HMS Plus w/ADB</i> (use same app as HMS 125)	<i>Accidental Death</i>
	<i>Yes</i>	<i>CFG</i> <i>Columbia Financial Group</i>	<i>Safeshield Term</i>	<i>Term</i>
	<i>Yes</i>	<i>CFG</i> <i>Columbia Financial Group</i>	<i>Dignified Choice</i>	<i>Whole Life</i>
	<i>Yes</i>	<i>Foresters</i>	<i>Strong Foundation</i>	<i>Term</i>
	<i>Yes</i>	<i>Foresters</i>	<i>Smart UL</i>	<i>UL/Permanent</i>
	<i>Yes</i>	<i>Foresters</i>	<i>Questionnaires for Term & UL</i>	
	<i>Yes</i>	<i>Foresters</i>	<i>PlanRight</i>	<i>Whole Life</i>
	<i>NO</i> <i>e-app only</i>	<i>GPM -</i> <i>Government Personnel</i> <i>Mutual</i>	<i>Equity Protector</i> Notes: E-App Only. • Must be contracted first.	<i>Term</i>
	<i>Yes</i>	<i>Great Western</i>	<i>Guaranteed Assurance</i>	<i>Whole Life</i>
	<i>Yes</i>	<i>MoO – Mutual of Omaha</i>	<i>Term Life Express Simplified</i> <i>Issue</i>	<i>Term</i>
	<i>Yes</i>	<i>MoO – Mutual of Omaha</i>	<i>Living promise</i>	<i>Whole Life</i>
	<i>Yes</i>	<i>MoO – Mutual of Omaha</i>	<i>Children’s Whole Life</i>	<i>Whole Life</i>
	<i>Yes</i>	<i>TransAmerica</i>	<i>Immediate Solutions</i>	<i>Whole Life</i>
	<i>* Be sure to include COVID questionnaires.</i>			

Agent Name: _____ Equis Agent #: EF _____

My resident state is: _____