

## Important Information You Need to Know

Your Insurance Advisor has submitted an order for life insurance through The ASA Group, a premier Insurance Brokerage Firm located in Little Rock, AR. This guide explains the steps involved in getting your insurance application completed. Should you have any questions about this process, please contact our Case Management Team at (501) 224-7739 or [CaseManagers@theasagroup.com](mailto:CaseManagers@theasagroup.com)



**Step 1. Within 48 hours an ASA Group company representative will email you to set up an appointment so that we may call you to complete the phone interview for your life insurance application.** This process typically takes approximately 30 minutes however, actual times may vary depending on individual circumstances. Please have the following required information prepared to save time during the call:

- List of medications you take
- Personal and household income
- Names, addresses and phone numbers of your doctors and medical care providers
- Assets, liabilities and net worth
- Driver's license number
- Replacement information including: company, face amount, policy number and year issued

**Step 2. A medical exam will be scheduled at your convenience.** This may be done at the end of your interview or on a separate call. Please be prepared with a few available dates and times.

**Please remember: your exam will include a blood draw which requires a 12 hour fast for best results.**

**Step 3. Appointment confirmation call:** The examiner will call you one or two days prior to your scheduled exam to confirm your appointment.

**Step 4. Completing your medical exam:** The examiner will meet you at the scheduled time and location. They will ask you a brief series of medical questions and measure your height, weight, blood pressure and pulse. A blood and urine specimen will be collected. An EKG may also be conducted depending on coverage and amount applied for.

**Please remember: your exam will include a blood draw which requires a 12 hour fast for best results.**



**Step 5. Application delivered, reviewed and signed:** Your application can be signed either traditionally or electronically.

**Electronic Signature:** You will receive an email notification that your life insurance application is complete and ready for your review and electronic signature. The e-mail will include simple instructions on how to complete your application

**Traditional Signature:** You will receive your application either by e-mail or regular mail, along with simple instructions on how to complete and return your application.

**Note: If someone other than yourself will be the owner of this policy, their signature is also required.**

**Step 6. Application and medical exam review:** The insurance company will review your application and medical exam. A report from your doctor(s) or health care provider(s) may be required. If your application is approved, the policy will be issued and your Insurance Advisor will contact you to make arrangements for policy delivery and payment of initial premium.

### The ASA Group

*Supporting Financial Advisors Since 1977*

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