

Level **4** Life

Steps to Success

- 1. Existing Coverage Requirements**
 - Premium Minimum: \$5,000 and Up
- 2. Acquire an Inforce Ledger**
 - Have the client sign the Inforce Ledger Request Form
 - Either the Planner or Level Four will send the request to the existing carrier.
 - The carrier then faxes or mails the agent/client the inforce ledger.
- 3. Gather Health History of the Client**
 - Have the client complete and sign the Level Four HIPPA/Health Authorization as well as the Field Underwriter to obtain medical records.
 - Fax or email the Field Underwriter, signed Authorization and Inforce
 - ledger to your team at Level Four Insurance Services.
- 4. The Level **4** Life**
 - All health and inforce policy information is reviewed at Level Four Insurance Services.
 - The evaluation of information is placed into the Level **4** Life.
 - The **L4L** is packaged and sent to you for client review.