

# Next Level Term

## Term Ticket

Proposed Insured Name \_\_\_\_\_

D.O.B. \_\_\_\_\_ Male\_\_ Female\_\_

Resident State \_\_\_\_\_

Proposed Insured's Income \_\_\_\_\_ (10x Income for Income Replacement Life Insurance)

Proposed Insured's Life Insurance Amount \_\_\_\_\_

Term Period: 10 Year\_\_ 15 Year\_\_ 20 Year\_\_ 30 Year\_\_

Spouse's Income \_\_\_\_\_ (10x Income for Income Replacement Life Insurance)

Spouse's Life Insurance Amount \_\_\_\_\_

Term Period: 10 Year\_\_ 15 Year\_\_ 20 Year\_\_ 30 Year\_\_

Contact Number \_\_\_\_\_

Best Time To Be Contacted \_\_\_\_\_

Fax or email to: Toll Free Fax: (866)-763-9136 [insurance@levelfourgroup.com](mailto:insurance@levelfourgroup.com)

Toll Free Phone: (866)-834-1040

Toll Free Fax: (866)-763-9136

Contact Level Four to "Experience Life at the Next Level"



# How to Drop a Ticket

## The Next Level Experience

### 1. Non-Med/Express App

Level Four can assist by talking to your clients directly to decrease your involvement and increase your sales.

### 2. Underwriting Questions

Our experienced staff will determine based on the age, death benefit and medical history as to whether the Non-Med or Express App will be utilized (see below for determining factors).

### 3. Quoting

Depending on how the medical questions are answered, we will give a guaranteed quote (Non-Med) or an approximate quote (Express App). Once the client has agreed to the death benefit and premium we will move to the review.

### 4. Review

Based on the determined program, we will run the correlating process and keep you updated as to the status of the application.

### 5. Approval

The Non-Med will be issued immediately and you will be notified. Once an Express App policy is approved (after the PHI and Paramed are completed), you will then be notified. We will share the final offer with the client.

### 6. How to Drop a Ticket

Complete the Term Ticket and either call Level Four with the client or fax/email the Term Ticket into us and we will call the client. We will complete steps 1 through 6 and provide you status throughout the process. Toll Free Fax: (866)-763-9136 or email at

## Which Experience is Right for Your Client?

	Non-Med Term	Express App Insurance	Next Level Experience
Death Benefit Amounts	\$25,000-\$250,000	\$100,000-\$30,000,000	We will assist in determining amounts.
Age Requirements	10 Year: 18-65 15 Year: 18-60 20 Year: 18-55 30 Year: 18-45	10 Year: 18-75 15 Year: 18-70 20 Year: 18-65 30 Year: 18-55	Along with the death benefit, we will establish what term period is appropriate for the client's needs.
Medical Requirements	9 Medical Questions 15 Minutes	Paramed, Phone Interview, NonMed Questions Two-page application 20 Minutes	Our associates you and the client decide which program is most suitable based on medical questions.
Payment	Credit Card Online	Upon policy delivery	
Signatures	E-Signature	No signature on submission. Required at policy delivery.	Both are applicable.
Quoting	Prices are guaranteed and are presented online.	Quote standard and preferred from the term quote engine on the Level Four Insurance website.	Our marketing staff is very familiar with quoting different amounts for all types of clients.
Turn-Around Time	Instant approval and policy issuance.	May take up to 4 weeks For policy issuance.	We will work with the client directly to get the policy approved.
Benefits	Online, instant approval, takes 15 minutes.	One-page, no up-front signature, high death Benefits. Term or permanent.	Increases your ability to set more appointments while allowing the experts at Level Four to decrease your case involvement.

Toll Free Phone: (866)-834-1040

Toll Free Fax: (866)-763-9136

Contact Level Four to "Experience Life at the Next Level"

