



Lovett EZ E-APP



Information needed for the life insurance phone interview

- Driver's license #
- Social security #
- Employer name & address
- Beneficiary information
 - Full name
 - Address & phone
 - DOB
- Medical information last 10 years
 - Doctors/clinics name, address & phone number
 - Dates consulted
 - Reason for consultation & diagnosis
 - Treatment & medications prescribed
 - Height & weight
- Other inforce life policies- company name & amount
- Financial information- income, assets, liabilities & net worth
- Family history
 - Parents/siblings current age or age of death
 - Parents/siblings state of health