



# NEW BUSINESS MEMO

## WHOLE LIFE

**Regular Mail:**

United Home Life Insurance Company  
 P.O. Box 7192  
 Indianapolis, IN 46207-7192

**FAX Number: 317-692-7711**

**Telephone: 800-428-3001**

**Overnight Mail:**

United Home Life Insurance Company  
 225 South East St  
 Indianapolis, IN 46202

\_\_\_\_\_ # pages including cover

Agt Name: \_\_\_\_\_ Agt # \_\_\_\_\_  
 Agt Phone: \_\_\_\_\_ Agt Fax: \_\_\_\_\_  
 Agt Email Address: \_\_\_\_\_@\_\_\_\_\_:

How do you prefer to be notified if we should need any underwriting requirements?  
 E-Mail  Fax  US Mail

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Did you personally see all persons proposed for insurance, read each question to the proposed insured and record their answers?  
 Yes  No

If No, how was the application taken? Solicited by:  Mail  Telephone  Internet  
 Fax or Other \_\_\_\_\_

**Personal History Interviews (PHIs):** You have two options:

**Option 1 (preferred option) Know Before You Go:** You, the agent, initiate a point-of-sale (POS) interview from your client's home by calling **866-333-6557**. Tell the operator this interview is for UHL and the Total Protection Series EIWL (graded benefit), Deluxe or Premier plan and hand the phone to your client (**Be specific as to which product you want so that only the plan specific questions will be asked**). During the call, the interviewer will conduct MIB and Prescription Drug searches to better determine your client's suitability for the product you've selected. Upon completion of the interview and based on the client's answers to the questions and results of the database searches, the interviewer will tell you whether or not the application should be sent to the Home Office.

**Option 2:** UHL will order the PHI after you've completed the application with your client. This option requires a PHI for all Total Protection Series Deluxe and Premier sales, regardless of face amount, and for EIWL sales with a face amount in excess of \$25,000. We will randomly order PHIs for EIWL sales of \$25,000 or less. What is the best time to reach this client?

Home Phone (\_\_\_\_\_) \_\_\_\_\_ available days?  Yes  No  
 Business Phone (\_\_\_\_\_) \_\_\_\_\_ available days?  Yes  No  
 Cell Phone (\_\_\_\_\_) \_\_\_\_\_ available days?  Yes  No

If a language other than English is required, please specify below.

**Did you complete a Point of Sale Personal History Interview with your client?**  Yes  No

Special Instructions you want us to know: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

- Application Completion "Tips"**
1. Make sure to use the app with the correct state variations
  2. If Child Rider is requested, submit application 200-359
  3. If the first premium is going to be drafted from the client's bank account, *provide a copy of a pre-printed voided check!* Otherwise, the case will be unnecessarily delayed
  4. Print legibly in English
  5. Keep original app until policy is issued
  6. Keep fax confirmation message that fax was successful

**MAIL POLICY TO:**  **Applicant**  **Agent**