



AppAssist[®] Checklist



Use this list to check that your responsibilities as the person who takes the request for life insurance have been fulfilled.

- Complete the Request for Life Insurance Interview form (LAAI297WP). This program is not available if existing coverage is being replaced. In addition, the client must be a US citizen or have a valid green card.
- Don't accept credit card information for interest in coverage in excess of \$500,000 or if the proposed insured is older than age 70. **ONLY THE INITIAL PREMIUM** can be paid by credit card. If this is the client's preference, include the required information on the request form and ask the client to sign it. Credit cards will not be debited until the application is completed, all delivery requirements are received and the policy is issued.
- DON'T ACCEPT CASH OR CHECKS.** If the client prefers to pay by check, payment will be requested when and if the application is approved.
- It is to your advantage to be sure the client receives a copy of the "Thank You for Your Interest..." form. The William Penn Call Center will also email a copy prior to its phone call. The brochure version, LAAI229WP, can be ordered through your general agency. The LAAI239WP form in PDF format can be printed and given, emailed or faxed.
- Make sure the client understands that life insurance coverage is not in force until the application is approved and the first premium and any delivery requirements have been received. Application approval is not guaranteed.
- Fax both pages of the completed Request for Life Insurance Interview form (LAAI297WP) to 516-229-3084 or mail it to William Penn Life Insurance Company of New York, 100 Quentin Roosevelt Boulevard, Garden City, New York 11530.
- For copies of forms, ratecards or customer brochures, see your general agency, your general agency website or www.LGAmerica.com.*



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