

# The process is simple.

Thank you for choosing William Penn Life Insurance Company of New York for your client's term life insurance needs.

## The next step in activating their coverage begins here.

### What happens now?

Your client will receive a call from one of our experienced insurance professionals on the day and time you requested.

To complete their application over the phone, they will listen to a series of recordings, which provide the necessary authorizations required by their state before starting the life insurance application.

Then, they'll spend about 45 minutes in which they'll be asked questions about their medical and financial history. This information will only be used for insurance coverage consideration and will be kept confidential in accordance with our privacy policy.

A copy of the completed application will be sent to your client over secure email for their records.

### Helpful documents to have on hand

While we can help you look up some of your client's medical and prescription history, it will help if they have some of the following information on hand during their interview:

- Driver's license and Social Security numbers
- Names, addresses and phone numbers of doctors, clinics and hospitals visited in past 10 years
- Reasons for and dates of medical treatment
- Names of prescription medicines
- Other life insurance policies, including company names, coverage amounts and policy numbers
- Financial information, including income, assets, liabilities and net worth

## Your client will be covered as soon as their application is processed and approved.