

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.

A short medical exam

If needed, we may schedule a free 30-minute medical exam. A trained medical examiner will take your client's height, weight, blood pressure and pulse; collect blood and urine; and possibly conduct an EKG; and/or complete a medical history report.

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

Exam-preparation tips

Your client should: avoid strenuous exercise the day before, avoid solid foods and alcohol 8 hours before, not use tobacco or drink caffeine 1 hour before, and drink water 1 hour before.