# Crump Disability Insurance Proposal Request

Phone: 800.582.7785 | Fax: 888.584.9073 | Email: disupportcenter@crump.com


## AGENT INFORMATION

Agent: _____ Telephone: _____ Ext.: _____

Contact: _____ Affiliation: _____

How should we return the illustration? (Please check one)

☐ Email: _____ ☐ Fax: _____ ☐ Other:_____

## CLIENT INFORMATION

Prospect: _____ ☐ Male ☐ Female

Date of Birth: _____ State of Residence: _____ State written in: _____

Occupation (Be specific): _____ Tobacco use? ☐ Yes ☐ No

Specific Duties (Time spent doing each): _____

Salary or Net Income: _____

Is Client: ☐ Salary Employee? ☐ Sole Prop? ☐ LLC/Partnership? ☐ S-Corp Owner? ☐ C-Corp Owner?

If business owner, length of time owned? _____ Number of employees: _____

Is there other coverage in force? ☐ Yes ☐ No Group LTD $ _____ Individual DI $ _____

Medical Conditions: _____

_____

Carrier preference? _____

## BENEFITS TO QUOTE: DISABILITY INSURANCE

Monthly Benefit: $_____ or ☐ Maximum Available

Elimination Period: ☐ 30 days ☐ 60 days ☐ 90 days ☐ 180 days ☐ 365 days ☐ 730 days

Benefit Period: ☐ 2 years ☐ 5 years ☐ Age 65 ☐ Age 67 ☐ To Age 70

Optional Benefits: ☐ Own Occ ☐ Residual ☐ COLA ☐ Future Purchase ☐ Social Security Rider ☐ Show All

## BENEFITS TO QUOTE: BUSINESS OVERHEAD EXPENSE (BOE)

Monthly Benefit: $_____ (Only expenses that would continue during disability)

Elimination Period: ☐ 30 days ☐ 60 days ☐ 90 days

Benefit Period: ☐ 12 months ☐ 18 months ☐ 24 months

Optional Benefits: ☐ Residual ☐ Future Purchase ☐ Salary of Replacement ☐ Show All

## BENEFITS TO QUOTE: DISABILITY BUY-OUT (DBO)

Monthly Benefit: $_____ or Lump Sum Benefit: $_____

Elimination Period: ☐ 12 months ☐ 18 months ☐ 24 months

Benefit Period: ☐ Lump Sum ☐ 24 months ☐ 36 months ☐ 60 months

Total Coverage Desired: $_____

Comments: _____

Do you need contracting for this carrier? ☐ Yes ☐ No Do you need an application sent? ☐ Yes ☐ No

## PLEASE INCLUDE APPLICATION

Contact the Crump Disability Solution Center for more information.

☎ 800.582.7785 disupportcenter@crump.com

Crump®