



THE THOMPSON AGENCY  
Life • Long Term Care • Disability • Annuity  
— BROKERAGE SERVICE —



Agent Name: \_\_\_\_\_ Date: \_\_\_\_\_

Client Name: \_\_\_\_\_ Resident State: \_\_\_\_\_

DOB: \_\_\_\_\_ Gender:  Male  Female Height & Weight: \_\_\_\_\_

Smoker?  Yes  No if No, date last used? \_\_\_\_\_

Product Type: \_\_\_\_\_ Face Amount: \_\_\_\_\_

Medical Impairments (please be as detailed as possible):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Non-Medical Concerns (Scuba Diving, private pilot, etc.):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Family History (parents, siblings):  
\_\_\_\_\_  
\_\_\_\_\_

Medications (reason of Rx, dosage):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Actions from other Carriers: \_\_\_\_\_

**We know how frustrating Impaired Risk Cases can be. Let us help you with our 5-step approach:**

1. Don't assume your client won't qualify for Life Insurance
2. Contact us via phone, email, etc. for a confidential discussion about your client's needs and concerns
3. We will determine the best way to shop the case
4. We'll shop or offers and get back to you with your client's options
5. Take the app based on our assessment