

Safe Harbor Term Quick Quote Form

Phoenix Quick Quote strives to provide you with a tentative underwriting offer within three business days.

The minimum face amount is \$100,000 and is only for Safe Harbor Term product.

Please refer to the Field Underwriting Guides for all other products.

Please submit the quote to the following e-mail address: PNX.SIMPLEUW@phoenixwm.com

Agency Name: _____ Contact Name: _____ Date _____

Email address: _____ Phone Number: _____

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*To ensure the most timely and accurate tentative underwriting offer,
this Phoenix Quick Quote request must include all of the following information:*

Client's Last Name: _____

(The client's last name should be provided in your email subject header.)

Gender: Male ___ Female ___ and Age: _____

Build: _____ ft / in. _____ lbs

Face Amount (\$100,000 minimum): \$ _____

In the last year, has the client been rated or declined by another insurance company? Yes ___ No ___

If "yes" please provide details to include the name of the company, date and reason for rating or declination.

Has the client used tobacco or nicotine replacement therapy in any form in the last year? Yes ___ No ___

If "yes" please indicate the form of tobacco used, frequency and the date of last use:

Medical History: Please include the date and name of diagnosis, test results, medications for each health issue, the results of all treatments and the results of follow up studies. If cancer history, please provide the type, stage/grade, treatment and treatment end date. Examples: 1) Diabetes diagnosed at age 50, treated with metformin, Jan 2015 glycohemoglobin A1c was 6.7 and there are no complications from the diabetes. 2) May 2011 heart attack and stent placement at that time. Has regular follow up with a normal treadmill in Jan 2015. Current treatment with amlodipine for hypertension and a statin for risk factor control.

1. _____

2. _____

3. _____

Additional Comments:

All quick quote tentative underwriting offers are subject to a Phoenix formal application, age and amount requirements, third party data and underwriting review. This Quick Quote Request form and the reply email, which is good for 45 days, must be submitted with the application. Thank you.