



INFORMAL INQUIRY

NOT AN APPLICATION FOR LIFE INSURANCE

APPLICANT INFORMATION				
Full Name:	Date of Birth:	Sex:	Height:	Weight:
Address:		City, State, Zip Code:		
SSN:	Face Amount:	Product Type:		
Producer Name, #, Email Address:	Income:	Net Worth:		
ADDITIONAL DETAILS				
Inforce Coverage?	Insurance Company Name:	Personal or Business?	Year Issued:	Face Amount:
Do you have plans for foreign travel? <input type="checkbox"/> YES <input type="checkbox"/> NO		If yes, please provide details. When, where, why and how long?		
Have you ever used any kind of tobacco or any other nicotine products?				Date last used:
<input type="checkbox"/> cigarettes <input type="checkbox"/> cigar (how many per year____) <input type="checkbox"/> pipe <input type="checkbox"/> nicotine gum/patch <input type="checkbox"/> chew				
APPLICANT MEDICAL INFORMATION				
Physician Information: (List all physicians seen in the past ten (10) years:				
Name:		Phone:		
Address:				
Date Last Seen:		Reason:		
Name:		Phone:		
Address:				
Date Last Seen:		Reason:		
Name:		Phone:		
Address:				
Date Last Seen:		Reason:		



AUTHORIZATION FOR RELEASE OF INFORMATION

For the purpose of obtaining the insurance coverage that I have requested, I hereby authorize **3 Mark Financial, Inc.** (the “Representative”) and its affiliated agencies, to disclose my personal financial and health information to the insurance companies, insurance agents and brokers acting on my behalf with respect to obtaining such insurance coverage.

I authorize any health plan, physician, health care professional, hospital, clinic, laboratory, pharmacy, medical facility, Pharmacy Benefit Manager or other health care provider that has provided treatment or services to me or on my behalf within the past 10 years (“my Providers”) to disclose my entire medical record and any other information that may be considered protected health information under the Health Insurance Portability and Accountability Act of 1996 (“HIPAA”) concerning me to the Representative and its staff, affiliated companies and/or entities, insurance companies and their reinsurers. This includes information on the diagnosis or treatment of Human Immunodeficiency Virus (HIV) infection and sexually transmitted diseases. This also includes information on the diagnosis and treatment of mental illness and the use of alcohol, drugs, and tobacco, but excludes psychotherapy notes.

By my signature below, I acknowledge that any agreements I have made with my Providers that restrict disclosure of my medical records and any associated HIPAA protected health information do not apply for purposes of this authorization and I instruct my Providers to release and disclose my entire medical record without restriction to the Representative. I understand that any information that is disclosed pursuant to this authorization may be subject to re-disclosure and no longer covered by certain federal rules governing privacy and confidentiality of health information.

The information contained in these medical and financial records will be held in confidence and may be used only for the purpose of the procurement, or the evaluation or underwriting for the possible procurement, of life, health, long term care, or other insurance products. The contents therein may be reviewed and assessed by a qualified staff consisting of medical directors, underwriters, underwriting assistants, or other related employees involved in the submission, receipt or evaluation of insurance applications or prospective applications of the insurance companies and their re-insurers as well as the Representative and its staff, employees and affiliated companies.

This authorization shall be valid for twelve (12) months from the date below. A copy of this authorization shall be as valid as the original. I understand that I am entitled to receive a copy of this authorization.

I understand that I may write to the Representative to revoke this authorization and that the revocation will take effect when the Representative receives my written request. I understand that any action already taken in reliance on this authorization cannot be reversed, and my revocation will not affect those actions. I also understand that, to the extent that other law allows an insurance company to contest a claim under an insurance policy or the insurance policy itself, my revocation of this authorization may not be effective.

I understand that if I refuse to sign this authorization, the Representative may not be able to provide full and complete information about the insurance coverage and its cost that may be available to me. I also understand and acknowledge that each of the affiliated insurers, or company to which I may formally apply, may require me to sign a similar authorization used exclusively by such insurer before they will process my application or offer insurance coverage. I understand that my refusal to sign this authorization will not affect my ability to obtain treatment or payment for services, or my eligibility for health care benefits; provided, however, that if a health care service (e.g., a physical exam) is requested solely for the purpose of creating protected health information to be disclosed to a third party, the health care provider may refuse to provide the service if I do not sign this authorization.



AUTHORIZATION FOR RELEASE OF INFORMATION

3 Mark Financial Represents: **Allianz, Americo, American General Life Insurance Company, American National, Ameritas, Ashar, Assurity, Columbus Life, Corebridge Financial, Cincinnati Life Insurance Company, Equitable, F & G Annuities & Life, Foresters, Gerber Life, John Hancock, Lafayette Life Insurance Company, Legal & General, Life Insurance Company of the Southwest, Lincoln Financial Group, Mass Mutual, Minnesota Life, Mutual of Omaha, National Life Group, Nationwide, North American Life Insurance, New York Life, One America Financial, Pacific Life, Pan American, Principal National Life Insurance, Principal Life Insurance, Protective Life, Prudential, Sagicor, Securian Life Insurance Company, Security Mutual Life, SBLI, Symetra, The United States Life Insurance Company, Transamerica, United of Omaha**

Printed Name of Proposed Insured

Signature of Proposed Insured

Signed and Dated On

At (City, State, Zip Code)