NFP™ Benefits Insurance Wealth Management

DI Fact Finder

Requesting an Individual Disability Coverage Proposal

Advisor Information

Full Name: ____________________

Firm Name: ____________________

Address: ____________________

City, State, Zip: ____________________

Email Address: ____________________

Phone Number: ____________________

Client Information

Full Name: ____________________

DOB or Age: ____________ Resident State: ____________ Work State: ____________

Gender: ______ Male ____ Female Smoker: ____ Yes _____ No Self-employed: _____ Yes _____ No

Occupation & Duties: ____________________

____

Years in current position: __________ If < one year, prior occupation: ____________________

Currently work from home: ______ Yes ____ No If Yes, %: ____________________

Annual Income: ____________________ Bonus: ____________________

Who will pay premium for desired coverage: _____ Employer _____ Employee

Other LTD or DI coverage: ____________________

Carrier: ____________________ Benefit Amount: ____________________

Known Medical History: ____________________

____

____

Case Design

Benefit Amount: _____ Maximum or Other: ____________________

Elimination Period: _____ 90 ____ 180 ____ 365

Benefit Period: _____ Two years ____ Five years ____ Age 65

Additional Benefits: _____ Own Occupation ____ Catastrophic Disability _____ Residual Disability

_____ Future Increase Options ____ Cost of Living Adjustments

continues >

About NFP

NFP's benefits, insurance and wealth management businesses provide a broad range of advisory and brokerage services to companies and individuals, helping them preserve their assets and prosper over the long term. Our advisors partner with clients to help provide client-focused, and comprehensive solutions, backed by NFP's national scale and resources. NFP is a leader in the delivery of benefits solutions for companies of all sizes and in the delivery of life insurance and wealth management solutions for high net worth individuals. Our leading, independent broker/dealer offers a broad range of options from some of the nation's top investment companies.

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