NFP™ Benefits Insurance Wealth Management

Multi-life DI Fact Finder

Advisor Information

Full Name: _____

Firm Name: _____

Address: _____

City, State, Zip: _____

Email Address: _____

Phone Number: _____

Case Information

Business Name: _____

Main Location City:_____ Main Location State: _____

Business Entity: ❑ C-Corp ❑ S-Corp ❑ Partnership ❑ LLC ❑ LLP

Nature of Business: _____

Existing Coverage

Group Long-term Disability Coverage:

Percentage or Specified Amount: _____

Cap (if applicable): _____

Employer-paid: ❑ Yes ❑ No Other _____

Elimination Period: _____

Benefit Period: _____

Proposed Coverage

Elimination Period: ❑ 90 ❑ 180 ❑ 365

Benefit Period: ❑ Two years ❑ Five years ❑ Age 65 ❑ Max Available

Employer-paid: ❑ Yes ❑ No ❑ Other _____

In addition to the above, a census is required to include the following information on each individual: Name, DOB, Gender, Occupation/Job Title, Resident State/Zip Code, Salary, Bonus/Commission (if applicable).

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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.