Steps to Begin Assessment Process

1. Gather in-force policy information:
    a. Client signs authorization to obtain current policy information
    b. Brokerage Professional Inc. (BPI) Marketing Dept. to contact carrier to obtain/order in-force ledger(s)
    - Order “alternative scenarios” at this time

2. Gather updated medical information:
    a. Client completes and signs medical history using Brokerage Professional’s Preliminary Insurance Evaluation Form
    b. BPI HIPPA Authorization Form signed by client
    c. BPI Underwriting to contact doctors and obtain updated APS records

3. Gather current financial & planning information:
    a. Advisor determines the client’s current goals and/or objectives
    b. Advisor to indicate goals and/or objectives on checklist and cover page

4. Submit in-force policy and updated medical information along with the Life Insurance Assessment[sm] Checklist & Cover Page to:

    Brokerage Professionals, Inc.
    Attn: Life Assessment Team
    7910 E. Thompson Peak Pkwy
    Suite #101
    Scottsdale, AZ 85255

** A Life Assessment team member will reply within 48 hours. Brokerage Professionals marketing representatives are available to assist you throughout the process at 480-505-2500 or 1-800-733-7729.