



# **Orange County Brokerage**

## **Insurance Services, Inc.**

*www.ocbis.com*

*17782 E. 17th St., #206  
Tustin, CA. 92780*

*Phone/Toll Free (714) 550-0159 (866) 357-9329  
Fax (714) 550-0869*

Help Us Provide You With The Most Efficient Life Application Processing.

### **Please Complete This Form!**

- |                    |                                                                                                                                        |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. Yes / No</b> | <b>Have the medical requirements been ordered?<br/>If yes, provide vendor name and scheduled date.</b>                                 |
| <b>2. Yes / No</b> | <b>Would you prefer to have OCBIS order the exam?</b>                                                                                  |
| <b>3. Yes/ No</b>  | <b>Have you included your contracting forms if you are not appointed?</b>                                                              |
| <b>4. Yes / No</b> | <b>Have you included the proposed insured's personal physician's name and address and phone #?</b>                                     |
| <b>5. Yes / No</b> | <b>Have you included the necessary HIV consent form, HIPAA and Replacement forms?</b>                                                  |
| <b>6. Yes / No</b> | <b>Is this case a 1035 Exchange? If yes, are the proper forms included? Please note that all carriers require original signatures.</b> |
| <b>7. Yes/No</b>   | <b>Have you completed the Agent's Report?</b>                                                                                          |
| <b>8. Yes/No</b>   | <b>UL products: Did you include a signed illustration or waiver of illustration?</b>                                                   |

**Notice:**

**Do Not collect money if you have reason to believe this is a potentially impaired risk case.**



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**Our goal at OCBIS is to process your cases as quickly as possible with the care and attention it deserves. Thank you for your cooperation**