

CALIFORNIA - APPLICATION FOR CHILDREN'S WHOLE LIFE INSURANCE



Underwritten by
United of Omaha Life Insurance Company
A Mutual of Omaha Company

Please mail application and appropriate forms to:

United of Omaha Life Insurance Company, Attn: Individual Life Underwriting, 9330 State Hwy 133, Blair, NE 68008

APPLICATION SUBMISSION GUIDELINES

- ☐ Attach a cover letter or additional information as needed.
- ☐ Leave all applicable forms and Life Insurance Buyer's Guide with the Proposed Insured.
- ☐ Please make sure all questions are answered and signatures completed.
- ☐ All changes should be initialed and dated by the Owner/Applicant.
- ☐ If a Financial Institution would receive compensation for a sale, the Financial Institution Consumer Disclosure must be signed by the client.

IMPORTANT FORMS

- ☐ Replacement Notice – if applicable, the client must sign and retain a copy for their records
- ☐ Payment Authorization – Complete this form if applicable





Underwritten by
United of Omaha Life Insurance Company
A Mutual of Omaha Company

3300 Mutual of Omaha Plaza
Omaha, Nebraska 68175



APPLICATION FOR CHILDREN'S WHOLE LIFE INSURANCE

SECTION A OWNER/APPLICANT

Owner/Applicant Name (First Name, Initial, Last Name)	Social Security No.	<input type="checkbox"/> Male <input type="checkbox"/> Female
Home Address (Street, City, State, ZIP)		Date of Birth (Month, Day Year)
Phone Number	E-mail Address	

Are you a legal permanent resident of the United States?..... ☐ Yes ☐ No

SECTION B BENEFICIARY

Primary Beneficiary	% of Proceeds	Relationship to Proposed Insured	Date of Birth
Contingent Beneficiary	% of Proceeds	Relationship to Proposed Insured	Date of Birth

If more space is needed, attach a sheet for additional details.

SECTION C SECONDARY ADDRESSEE (OPTIONAL) - THIS PERSON WILL RECEIVE COPIES OF OVERDUE PREMIUM AND LAPSE NOTICES.

Name (First Name, Initial, Last Name)	Phone Number
Address (Street, City, State, ZIP)	

SECTION D PROPOSED INSURED(S) INFORMATION (LIST CHILDREN AGES 14 DAYS TO 17 YEARS)

First Name, Middle Initial, Last Name	Date of Birth	Sex M/F	Coverage Amount	Premium	Owner Relationship to Insured	Legal Permanent Resident of the United States?
				\$		<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$		<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$		<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$		<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$		<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$		<input type="checkbox"/> Yes <input type="checkbox"/> No
				\$		<input type="checkbox"/> Yes <input type="checkbox"/> No

NOTE: Use additional sheet if necessary.

SECTION E OTHER COVERAGE AND REPLACEMENT INFORMATION

Do any of the Proposed Insureds:

1. have any existing life insurance or annuity contracts with the company or any other company?..... ☐ Yes ☐ No
2. intend for this insurance to replace or change any existing life insurance or annuity contract with the company or any other company? ☐ Yes ☐ No

IF "YES" to either question, GIVE DETAILS BELOW:

Proposed Insured's Name	Company	Policy Number	Will this insurance be replaced?
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

THE PRODUCER SHALL COMPLY WITH ANY ADDITIONAL STATE AND/OR COMPANY REPLACEMENT REQUIREMENTS.

T144LCA17A

T144LCA17A

SECTION F HEALTH INFORMATION**HAVE ANY OF THE PROPOSED INSURED(S) RECEIVED MEDICAL CARE FOR OR HAD:**

- (a) a heart or circulatory system disease, birth defect, or mental or developmental disorder including autism and Down's Syndrome? ☐ Yes ☐ No
- (b) any other chronic medical condition which has required care within the past 3 years? ☐ Yes ☐ No

NOTE: Provide details for "Yes" answers. Please include Proposed Insured's name and illness or condition. (Use additional sheet if necessary.)

Proposed Insured's Name	Details of Illness or Condition

SECTION G PREMIUM AND BILLING INFORMATION

- 1 Amount collected \$ _____ Modal Premium for Proposed Insured(s) \$ _____
- 2 Mode of Payment: ☐ Monthly Bank Service Plan ☐ Annual ☐ Semi-Annual ☐ Quarterly

SECTION H AGREEMENT

I represent that my above answers are true and complete to the best of my knowledge and belief. I also understand that this coverage will not be in force until this application is completed in full and approved by United of Omaha Life Insurance Company, and the initial premium is received during the lifetime of the Proposed Insured(s).

I have read and understand this Agreement Section and I approve all the answers as recorded in this application.

Signed at: _____ Today's Date: _____
City State Month Day Year

Signature of Owner/Applicant

- 1 In addition to the above Agreement, has the Applicant informed you, the Producer(s), that any Proposed Insured has one or more existing life insurance policies and/or annuity contracts in force? ☐ Yes ☐ No
- 2 Do you, the Producer(s), have reason to believe that the policy applied for has replaced or will replace any existing life insurance policy(ies) and/or annuity contract(s)? ☐ Yes ☐ No
If "Yes," the Producer(s) shall comply with all state and/or Company replacement requirements, including completing the applicable state required replacement forms and submitting copies of these forms with the application.
- 3 Have you, the Producer(s), asked each question exactly as written and recorded the answer completely and accurately? ... ☐ Yes ☐ No
(If "No," explain.) _____
- 4 Did you, the Producer(s), give the Applicant the Life Insurance Buyer's Guide? ☐ Yes ☐ No
(If "No," explain.) _____

Signature of Producer #1 Production Number _____ Date _____ Month _____ Day _____ Year _____

Signature of Producer #2 Production Number _____ Date _____ Month _____ Day _____ Year _____

Print or Stamp Producer #1 Name Print or Stamp Producer #2 Name Marketer/Agency Name



T144LCA17A

UNITED OF OMAHA LIFE INSURANCE COMPANY

Mutual of Omaha Plaza, Omaha, NE 68175, 402-342-7600



PAYMENT AUTHORIZATION FORM

Proposed Insured/Insured: _____ Policy Number(s) if known: _____

Complete this form only when authorizing a bank account for withdrawal for a premium payment.

PAYMENT INFORMATION FOR THE FIRST PAYMENT- CAN BE DIFFERENT THAN THE ONGOING PAYMENTS

Initial Premium Payment (select only one option) Amount Quoted \$ _____

- ☐ Deduct premium immediately upon approval/issue
- ☐ Deduct initial premium on or after: _____/_____/_____ (Please Note: If the policy issue is after the date selected, the initial payment will be deducted on the date the policy is issued or all delivery requirements are received.)
- ☐ Check collected and mailed to Mutual of Omaha

Money will be deducted from your account as stated above. The first deduction may occur on a date different than the ongoing payments. Depending on the amount of time elapsed between the policy date and the date the policy is issued, the amount of the first deduction may exceed one regular payment amount. We **CANNOT** establish electronic payments from foreign banks.

PAYMENT INFORMATION FOR ONGOING PAYMENTS- AUTOMATIC BANK ACCOUNT DEDUCTION

Ongoing Automatic Monthly Premium Payments (Once a Month)- Select only one option

- ☐ Choose the day payments will be deducted every month from your bank account:
(1st through the 28th or Last Day of every month) _____
- OR-
- ☐ Choose the week and weekday that payments will be deducted every month from your bank account:
(For example, 3rd Wednesday of every month)

Week (1st, 2nd, 3rd, 4th, Last) _____ **Weekday (Mon, Tue, Wed, Thu, Fri)** _____

Each month, payments will be automatically deducted from the account below on the day selected above. If no date is selected, premiums will be deducted on the policy date (which is determined at the time the policy is issued and can be found within the policy). **Ongoing deductions will begin once the policy is issued. If the scheduled deduction date lands on a weekend or holiday, the payment will process on the following business day.**

PAYOR INFORMATION

Name of payor as shown on bank account: _____

If premium is **NOT** paid by Proposed Insured/Insured, indicate the bank account owner's relationship to Proposed Insured/Insured by selecting one of the following. (Additional documentation may be required)

- ☐ Employer ☐ Living Trust
- ☐ Business owned by Proposed Insured/Insured or spouse ☐ Other _____
- ☐ Power of Attorney or legal guardian

PAYOR ACCOUNT INFORMATION

1. Account Type (check one): ☐ Checking ☐ Savings

2. Name of Financial Institution: _____

3. Complete information below or attach a voided check here.

Bank Routing Number: _____ Bank Account Number: _____

(Do not use Debit/Credit Card numbers)

Memo _____	Signed By: _____
1:123456789:1 12345678 11* 1234 11*	

Bank Routing
Number

Bank Account
Number

Check Number (if shown at bottom, may
be shown before or after the account #)

PAYOR AUTHORIZATION

I authorize United of Omaha Life Insurance Company to initiate any initial or recurring preauthorized electronic transfers from my account. I understand the amounts may vary as premium shortages may result from a variety of reasons, including underwriting adjustments. This authorization will be effective until I give you at least three business days notice to cancel. If notice is given verbally, United of Omaha Life Insurance Company may require written confirmation within 15 days after my verbal notice.

Date _____ X _____
Mo./Day/Yr. Payor Authorized Signature as Shown on Account

Sale or Liquidation of Assets Disclosure to Elders

California Insurance Code §789.8 requires that the following notice be given to all prospective purchasers of life insurance or annuities, age 65 or over:

The sale or liquidation of any stock, bond, IRA, certificate of deposit, mutual fund, annuity, or other asset to fund the purchase of this product may have tax consequences, early withdrawal penalties, or other costs or penalties as a result of the sale or liquidation.

You or your agent may wish to consult independent legal or financial advice before selling or liquidating any assets and prior to the purchase of any life or annuity products being solicited, offered for sale, or sold.

L8420_CA

GIVE THIS NOTICE TO THE APPLICANT



UNITED OF OMAHA LIFE INSURANCE COMPANY

A MUTUAL *of* OMAHA COMPANY

Notice Regarding Replacement Replacing Your Life Insurance Policy or Annuity?

Are you thinking about buying a new life insurance policy or an annuity and discontinuing or changing an existing one? If you are, your decision could be a good one — or a mistake. You will not know for sure unless you make a careful comparison of your existing benefits and the proposed benefits.

Make sure you understand the facts. You should ask the company or agent that sold you your existing policy to give you information about it.

Hear both sides before you decide. This way you can be sure you are making a decision that is in **your** best interest.

We are required by law to notify your existing company that you may be replacing their policy.

If purchasing an annuity, have you had another annuity exchange or replacement within the past 60 months? . . . ☐ YES ☐ NO

Applicant's/Owner's Signature

Date

Agent's Signature



UNITED OF OMAHA LIFE INSURANCE COMPANY

A MUTUAL *of* OMAHA COMPANY

Notice Regarding Replacement Replacing Your Life Insurance Policy or Annuity?

Are you thinking about buying a new life insurance policy or an annuity and discontinuing or changing an existing one? If you are, your decision could be a good one — or a mistake. You will not know for sure unless you make a careful comparison of your existing benefits and the proposed benefits.

Make sure you understand the facts. You should ask the company or agent that sold you your existing policy to give you information about it.

Hear both sides before you decide. This way you can be sure you are making a decision that is in **your** best interest.

We are required by law to notify your existing company that you may be replacing their policy.

If purchasing an annuity, have you had another annuity exchange or replacement within the past 60 months? . . . ☐ YES ☐ NO

Applicant's/Owner's Signature

Date

Agent's Signature

