

## SecureDI - Brokers Report

**This report must be fully completed and submitted with each SecureDI application.**

- Applications must be submitted no later than 20 days after the date the application is signed.
- The Monthly Disability Income Benefit applied for **must be in multiples of \$25**.
- You need to obtain a cheque for at least one month's premium. **We will not proceed to underwrite an application unless a premium cheque is submitted with the application.** Please make the cheque payable to **"Reliable Life Insurance Company"**. (Please note: No interim or conditional coverage is provided during the underwriting process.)
- Please advise the applicant that the underwriter may conduct a telephone interview.
- Please note that coverage effective dates are always the 1<sup>st</sup> of the month.
- If your client has been declined for disability insurance coverage in the last 6 months, please advise what medical requirements were obtained, and by which insurance carrier.

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- Please advise under what company or individual name should the Agent Contract be titled?

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- Is there any other information that would be helpful in assessing this application?
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### **Application Submission Checklist**

Have you included ...

- A fully completed application including your signature and that of the proposed insured.
- A signed Point of Sale Disclosure Form (this is mandatory document)
- A deposit cheque for at least one month's premium (mandatory – no COD cases allowed)
- If premiums are monthly, the PAP authorization and a void cheque.
- Financial evidence and/or signed financial authorization form.
- If you are not contracted with us, copy of your license and proof of E & O insurance.