



**JEFFERSON NATIONAL®**

---

**Please fax or send  
completed application (along with  
this cover sheet) to:**

**FAX:**

**1-608-755-7955**

**MAIL:**

**SAS**

**Simple Term**

**PO Box 1086**

**Janesville, WI 53547**

---

**Date**

---

**Name**

---

**phone number**

---

**email address**

---

**Agent ID#**

To learn more please visit our websites at [www.jeffersoninsurance.com](http://www.jeffersoninsurance.com) or [www.sas-it.com](http://www.sas-it.com).  
Jefferson National is domiciled in Dallas, TX, with offices in New York, NY in and Louisville, KY.  
For Broker/Dealer and Agent use only. Not for public use.

**Application for Life Insurance**

1. Insured Information				Owner Information									
Name				Name									
Street Address				Street Address									
City		State		Zip		City		State		Zip			
e-mail			Phone			e-mail			Phone				
Sex M <input type="checkbox"/> F <input type="checkbox"/>		Date of Birth		Place of Birth				Sex M <input type="checkbox"/> F <input type="checkbox"/>		Date of Birth		Place of Birth	
Social Security Number				Driver's License # & State				Social Security Number					
Height		Weight											
feet		inches		lbs.									
2. Primary Beneficiary						Contingent Beneficiary							
Name				Relationship		Name				Relationship			
3. Plan Applied For		<input type="checkbox"/> Ten Years <input type="checkbox"/> Fifteen Years <input type="checkbox"/> Twenty Years <input type="checkbox"/> Thirty Years											
4. Coverage Amount		\$											
5. Payment Frequency		<input type="checkbox"/> Annual <input type="checkbox"/> Semi-Annual <input type="checkbox"/> Quarterly <input type="checkbox"/> Monthly											
6. Payment Method													
<input type="checkbox"/> Charge My Credit Card		<input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Discover <input type="checkbox"/> American Express											
		Card Number				Exp.							
<input type="checkbox"/> Debit My Checking Account		Bank Name		Account Number		ABA Number							
		(first 9 numbers in the lower left-hand corner of your check – you may also attach a voided check)											
7. Replacement		Do you plan to replace, change or modify any existing life insurance as a result of this application? <input type="checkbox"/> Yes <input type="checkbox"/> No (if yes, additional forms may be required, depending upon state requirements)											
8. Underwriting													
1. In the past 12 months have you smoked cigarettes, cigars, pipes or used tobacco or nicotine in any form including snuff, dip, chew, nicotine patch, gum or other substitutes?										Y <input type="checkbox"/>		N <input type="checkbox"/>	
2. In the past 5 years, have you had or been treated for or consulted a physician or other practitioner for any of the following: heart or coronary artery disease or disorder, stroke, peripheral vascular disease, cancer, diabetes, hepatitis C, cirrhosis, pancreas disease or disorder, emphysema or chronic lung or pulmonary disease (COLD or COPD), alcohol or drug use?										Y <input type="checkbox"/>		N <input type="checkbox"/>	
3. In the past 5 years, have you been hospitalized for the following: chest pain, high blood pressure, asthma, depression, manic-depression, other mental and nervous disorder, paralysis, seizure, anemia, or kidney or liver disease or disorder (excluding kidney stones)?										Y <input type="checkbox"/>		N <input type="checkbox"/>	
4. In the past 2 years, have you had your driver's license revoked, suspended or been convicted of reckless driving, driving without a valid license or for driving while under the influence of alcohol or drugs (DWI, DUI)? Or have you had more than 2 moving violations in the past 12 months?										Y <input type="checkbox"/>		N <input type="checkbox"/>	
5. In the past or next 12 months, have you engaged in or do you plan to engage in risky activities, extreme sports or have you flown a plane other than as a commercial airline pilot? Or are you engaged in a hazardous occupation that exposes you to the risk of loss of life?										Y <input type="checkbox"/>		N <input type="checkbox"/>	
6. Has the proposed insured ever been diagnosed or treated by a member of the medical profession for, AIDS or ARC or tested positive for antibodies to AIDS or the HIV Virus by means of an FDA-licensed test? (Test results from anonymous, or alternate counseling and test sites or from home test kits need not be revealed)										Y <input type="checkbox"/>		N <input type="checkbox"/>	
7. In the past 12 months, have you either been hospitalized for 5 or more consecutive days, or missed 5 or more consecutive days from work or school other than for vacation or family leave?										Y <input type="checkbox"/>		N <input type="checkbox"/>	

**9. Authorization & Signing**

**For underwriting and claims investigation purposes, I hereby authorize:**

Any physician or other medical practitioner; hospital; clinic; pharmacist or other pharmacy benefit manager; insurance company consumer reporting agency; or the Medical Information Bureau (MIB) to give Jefferson National Life Insurance Company or its reinsurer(s) ALL MEDICAL INFORMATION on my behalf including findings on medical care, prescription histories, alcohol or drug abuse information, psychiatric or psychological care or examination (excluding psycho-therapy notes), or surgery, as they apply to me, my spouse, or any of my children who are to be insured.

**I authorize Jefferson National Life Insurance Company or its reinsurer(s) to:**

- (1) Release any medical information to the MIB, Inc;
- (2) Obtain an investigative consumer report on me. I know that I am entitled to a copy of this consumer report, upon request;
- (3) Obtain personal history information on me;
- (4) Obtain medical history and prescription history information from my attending physician, clinic or hospital; pharmacists or other pharmacy benefit managers;
- (5) Obtain motor vehicle records on me, my spouse or any of my children who are to be insured; and
- (6) Obtain a credit or fraud report on me, my spouse or any of my children who are to be insured.

**I understand** that if I refuse to sign this authorization, Jefferson National Life Insurance Company will not be able to process my application. I understand that I may revoke this authorization by notifying Jefferson National Life Insurance Company in writing of my desire to revoke it. However, I understand that if I revoke this authorization, it will not have any affect on actions already taken by Jefferson National Life Insurance Company in reliance on this authorization and may result in this application or a claim being denied. **I understand** that a copy of this authorization will be included in my policy. I understand that the information described herein and disclosed to Jefferson National Life Insurance Company is protected by certain federal privacy regulations. Once Jefferson National discloses this information, as allowed in this Authorization, the information may no longer be subject to federal privacy regulations. **I understand**, however, that Jefferson National requires the entities listed above with whom it shares this information to enter into confidentiality agreements prohibiting the redisclosure of this information except as allowed herein. I understand that the coverage shall be in effect as of the date of this application if and only if the proposed insured is an insurable risk on the date of this application and the first scheduled premium is paid with this application.

**By signing your name and date below, you agree: (1) that you have read and fully understand all the questions, answers and statements given in this application; (2) that the statements and answers on this application are full, complete and true to the best of your knowledge; (3) you intend to form a legally binding contract; (4) this authorization is valid for two and one-half years from this application date; and (5) a printout of the terms stated above will constitute a "writing" under any applicable law or regulation.**

Insured's Signature	Date
---------------------	------

Owner's Signature (if different from Insured)	Date
---	------

**Company Representative Replacement Questionnaire**

To the best of your knowledge, will this insurance that is applied for replace or change any existing life insurance or annuity? (if yes, please complete additional forms as required)	Y <input type="checkbox"/> N <input type="checkbox"/>
--	---

Authorized Company Representative Signature	Date
---	------