

**Full Name** \_\_\_\_\_

## LINES OF BUSINESS

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Final Expenses       | <input type="checkbox"/> ACA Obamacare           | <input type="checkbox"/> Annuities           |
| <input type="checkbox"/> Medicare Advantage   | <input type="checkbox"/> Life Insurance          | <input type="checkbox"/> Mortgage Protection |
| <input type="checkbox"/> Medicare Supplements | <input type="checkbox"/> Short Term/ Ancillaries | <input type="checkbox"/> Legal Services      |

**Other** : \_\_\_\_\_

## CARRIERS

### ACA

- |  |  |                                 |
|--|--|---------------------------------|
| <input type="checkbox"/> Molina Healthcare | <input type="checkbox"/> Ambetter                | <input type="checkbox"/> BCBS   |
| <input type="checkbox"/> Oscar             | <input type="checkbox"/> Community Health Choice | <input type="checkbox"/> Friday |

### Medicare Advantage

- |                                 |  |   |
|---------------------------------|--|---|
| <input type="checkbox"/> Humana | <input type="checkbox"/> BCBS              | <input type="checkbox"/> Aetna                |
| <input type="checkbox"/> Cigna  | <input type="checkbox"/> Devoted           | <input type="checkbox"/> KelseyCare Advantage |
| <input type="checkbox"/> Oscar  | <input type="checkbox"/> United HealthCare | <input type="checkbox"/> Wellcare             |

### Life Insurance /Annuities/Ancillaries

- |                              |   |                                   |
|------------------------------|---|-----------------------------------|
| <input type="checkbox"/> AIG | <input type="checkbox"/> National General | <input type="checkbox"/> Assurity |
|------------------------------|---|-----------------------------------|

### Final Expenses

- |  |                                   |                                      |
|--|-----------------------------------|--------------------------------------|
| <input type="checkbox"/> United American | <input type="checkbox"/> Assurity | <input type="checkbox"/> Senior Life |
|--|-----------------------------------|--------------------------------------|

## AGE RANGE

25	35	40	45	50	55	60	65	70	80+
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## INCOME LEVEL

Less \$20k	\$25k	\$50k	\$75k	\$100k	\$250k	\$500k	\$1Million +
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## ZIP CODES/ METRO AREA/ CITIES

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