

## TSCPA GROUP 10-YEAR LEVEL TERM LIFE APPLICATION

PLEASE PRINT IN INK OR TYPE. DO NOT USE CORRECTION FLUID OR GEL PENS. INITIAL AND DATE ANY CHANGES YOU MAKE.

### 1. Member Information:

Full Name \_\_\_\_\_ SS #    -   -

Last First Middle Initial

Street Address \_\_\_\_\_

City \_\_\_\_\_ State (or Province) \_\_\_\_\_ Zip Code     -

Home Phone (\_\_\_\_\_) \_\_\_\_\_ Work Phone (\_\_\_\_\_) \_\_\_\_\_

Fax (\_\_\_\_\_) \_\_\_\_\_ Email \_\_\_\_\_

For internal use only. Email address will never be sold or shared.

Marital Status:  Married  Divorced  Single  Widowed  Civil Union<sup>1</sup>  Domestic Partner<sup>1</sup>

<sup>1</sup>Eligibility of Domestic Partner/Civil Union is determined by State Law

Are you currently insured under any other TSCPA Life Plans?  Yes  No If "Yes," indicate which plan(s) and provide details below (person insured and amount of insurance):  Group Term Life  10-Year Level Term Life

Details \_\_\_\_\_

LIST BELOW ONLY THOSE INDIVIDUALS APPLYING FOR COVERAGE	BIRTH DATE	HEIGHT	WEIGHT	SEX
Member (Full Name):	/ /	FT. IN.	LBS.	<input type="checkbox"/> M <input type="checkbox"/> F
Eligible Dependent <input type="checkbox"/> Spouse <input type="checkbox"/> Domestic Partner** (Full name):	/ /	FT. IN.	LBS.	<input type="checkbox"/> M <input type="checkbox"/> F

\*See Plan information for definition of eligible dependents. If more than two children are proposed for insurance, attach a separate sheet. Please **sign and date** the additional sheet.

\*\*Submit a completed Declaration of Domestic Partnership form—not applicable in Oregon

In the next 12 months does any person proposed for insurance intend to reside outside the U.S. or Canada?

Member:  Yes  No Country(ies) \_\_\_\_\_ How Long? \_\_\_\_\_

Spouse:  Yes  No Country(ies) \_\_\_\_\_ How Long? \_\_\_\_\_

### 2. Membership Affiliation:

Association Membership is required for participation in this plan. TSCPA Membership # \_\_\_\_\_

### 3. Premium Billing:

Following your initial billing, you will be billed twice a year on January 1 and July 1 or you can also access a secure website where you can register to have your premium withdrawn from your bank account or charged to your credit card.

Be Sure To Complete All Pages and Sign Last Page  
DO NOT SEND PAYMENT: Upon approval, you will be notified of the premium due.

**4. Insurance Requested:** Refer to plan information for eligibility, options, and coverage description.

**I HEREBY APPLY FOR THE FOLLOWING GROUP 10-YEAR LEVEL TERM LIFE INSURANCE COVERAGE:**

A. MEMBER OPTION:  Insurance requested \$ \_\_\_\_\_  
SPOUSE OPTION\*:  Insurance requested \$ \_\_\_\_\_

\*Spouse coverage cannot exceed 100% of member's coverage.

B. TOBACCO/NICOTINE USE: Have you or your spouse (if proposed for coverage) used tobacco or any nicotine substitute in any form (including nicotine patches and nicotine chewing gum)?

Member:  Yes  No Spouse:  Yes  No

If "Yes," Please state when you last used tobacco or nicotine and specify the product?

Member \_\_\_\_\_ / \_\_\_\_\_ Spouse \_\_\_\_\_ / \_\_\_\_\_  
MONTH/YEAR PRODUCT MONTH/YEAR PRODUCT

**C. INSURANCE REPLACEMENT:**

**RESIDENTS OF NEW YORK: IMPORTANT REPLACEMENT INFORMATION**

It may not be in your best interest to replace existing life insurance policies or annuity contracts in connection with the purchase of a new life insurance policy, whether issued by the same or a different insurance company. A replacement will occur if, as part of your purchase of a new life insurance policy, existing coverage has been, or is likely to be, lapsed, surrendered, forfeited, assigned, terminated, changed or modified into paid-up insurance or other forms of benefits, loaned against or withdrawn from, reduced in value by use of cash values or other policy values, changed in the length of time or in the amount of insurance that would continue, or continued with a stoppage or reduction in the amount of premium paid. Prior to completing a replacement transaction, you may want to contact the insurance company or agent who sold you the life insurance or annuity contract that will be replaced, to help you decide whether the replacement is in your best interest.

**RESIDENTS OF NEW YORK:** I have read the Important Replacement Information above.

Is the Life Insurance applied for intended to replace, in whole or in part, any existing insurance or annuity?

Member:  Yes  No Spouse:  Yes  No

**RESIDENTS OF ALL OTHER STATES:** Is the Insurance applied for intended to replace, discontinue, or change an existing policy?

Member:  Yes  No Spouse:  Yes  No

**B. CURRENT COVERAGE:**

**Member:**

Do you have other life insurance in force? If "Yes," total amount in all companies:  Yes  No Amt: \$ \_\_\_\_\_ Company \_\_\_\_\_

Do you have other insurance applications pending? If "Yes," indicate amount and company:  Yes  No Amt: \$ \_\_\_\_\_ \_\_\_\_\_

**Spouse:**

Do you have other life insurance in force? If "Yes," total amount in all companies:  Yes  No Amt: \$ \_\_\_\_\_ Company \_\_\_\_\_

Do you have other insurance applications pending? If "Yes," indicate amount and company:  Yes  No Amt: \$ \_\_\_\_\_ \_\_\_\_\_

**5. Beneficiary Designation:** Insert name, relationship, and address.

I make the following beneficiary designation with respect to all the insurance on my life under this Group 10-Year Level Term Life Insurance Plan. The beneficiary for dependent coverage shall be the insured member—or owner of the coverage if other than the member—as provided in the Group Policy. (If you want to name a different beneficiary for spouse coverage, please contact the Administrator.) (1) In naming more than one beneficiary, please note if each is to be primary and/or secondary, and the percentage of death proceeds to be distributed to each. (2) If naming a trust, please indicate the full name and date of the trust. (Attach a separate sheet if necessary, then sign and date it.)

Primary  Secondary \_\_\_\_\_ %

Beneficiary Name \_\_\_\_\_ Last First Middle Initial DOB: \_\_\_\_\_

Relationship to Member \_\_\_\_\_ Social Security #    -   -

Address: \_\_\_\_\_ Street City State Zip Code

Home Phone ( \_\_\_\_\_ ) \_\_\_\_\_ Work Phone ( \_\_\_\_\_ ) \_\_\_\_\_

**6. Member Statement of Health:** Please any changes made to this form.

To the best of your knowledge and belief, answer the following questions as they apply to you and your lawful spouse, if applying.		MEMBER	SPOUSE
A.	Are you taking any perscription medication or receiving or contemplating any medical attention or surgical treatment	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
B.	During the past five years has any person to be insured ever been medically diagnosed by a physician as having or been treated for: heart or circulatory trouble, elevated blood pressure, chest pain or pressure, gynecological or genitourinary disorders, ulcers, cancer, diabetes, mental or nervous disorder or psychotherapeutic treatment, epilepsy, respiratory disorder, kidney or liver disorder (including hepatitis), enlarged lymph nodes or immunodeficiency disorder, thyroid disorder, blood disorder, albumin, blood, or sugar in urine, back trouble/ disorder, arthritis, or unexplained weight loss?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
C.	During the past five years have you been counseled, treated, or hospitalized for the use of alcohol or drugs?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO

If answered "Yes" to questions A, B, or C, please include details: \_\_\_\_\_

**DEPENDING ON THE AMOUNT OF INSURANCE YOU ARE REQUESTING, YOU WILL BE CONTACTED BY A SERVICE PROVIDER ON BEHALF OF NEW YORK LIFE INSURANCE COMPANY TO ASK YOU ABOUT YOUR MEDICAL HISTORY.**

What time and telephone number would be best to contact you? \_\_\_\_\_

**7. Fraud Notices**

**For Residents of all states except those listed below:** Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which may be a crime and may subject such person to criminal and civil penalties.

**FOR RESIDENTS OF CA:** Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which may be a crime and may subject such person to criminal and civil penalties. The falsity of any statement in the application for any policy shall not bar the right to recovery under the policy unless such false statement was made with actual intent to deceive or unless it materially affected either the acceptance of the risk or the hazard assumed by the insurer. **RESIDENTS OF CO:** the following also applies: Any insurance company or agent who defrauds or attempts to defraud an insured shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies. **RESIDENTS OF AL/AR/LA/RI:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison. **FOR RESIDENTS OF D.C.:** WARNING: It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits, if false information materially related to a claim was provided by the applicant. **RESIDENTS OF FL:** Any person who knowingly and with intent to injure, defraud, or deceive any insurer files a statement of claim or an application containing any false, incomplete, or misleading information is guilty of a felony of the third degree. **RESIDENTS OF KS:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance may be guilty of insurance fraud as determined by a court of law. **RESIDENTS OF ME:** It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties may include imprisonment, fines or a denial of insurance benefits. **RESIDENTS OF MD:** Any person who knowingly or willfully presents a false or fraudulent claim for payment of a loss or benefit or who knowingly or willfully presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison. **RESIDENTS OF NJ:** WARNING: Any person who includes any false or misleading information on an application for an insurance policy is subject to criminal and civil penalties. **RESIDENTS OF NY:** Any person who knowingly and with intent to defraud any insurance company or any other person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation. **RESIDENTS OF OK:** WARNING: Any person who knowingly, and with intent to injure, defraud or deceive any insurer, makes any claim for the proceeds of an insurance policy containing any false, incomplete or misleading information is guilty of a felony. **RESIDENTS OF PUERTO RICO:** Any person who, knowingly and with the intent to defraud, presents false information in an insurance request form, or who presents, helps or has presented a fraudulent claim for the payment of a loss or other benefit, or presents more than one claim for the same damage or loss, will incur a felony, and upon conviction will be penalized for each violation with a fine no less than five thousand (5,000) dollars nor more than ten thousand (10,000) dollars, or imprisonment for a fixed term of three (3) years, or both penalties. If aggravated circumstances prevail, the fixed established imprisonment may be increased to a maximum of five (5) years; if attenuating circumstances prevail, it may be reduced to a minimum of two (2) years. **RESIDENTS OF TN/WA:** It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits. **RESIDENTS OF VA:** Any person who, with the intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing false or deceptive statements may have violated state law.

**Be Sure To Complete All Pages and Sign Last Page**  
**DO NOT SEND PAYMENT:** Upon approval, you will be notified of the premium due.

**7. Fraud Notices**

I understand that New York Life has the right to require additional information and, if necessary, an examination by a physician. I ask New York Life to rely on all such statements made on this form, and any supplements to it, while considering this request. I also understand that the coverage afforded will be in consideration of the answers and statements set forth above.

**AUTHORIZATION:** I authorize any physician, medical practitioner, hospital, medical or medically related facility, laboratory, insurance company or MIB, Inc. to release information, including prescription drug records, maintained by physicians, pharmacy benefit managers, and other sources of information to New York Life Insurance Company, its subsidiaries or the plan administrator about the physical and mental health of any persons proposed for insurance, including significant history, findings, diagnosis and treatment, but excluding psychotherapy notes.

A photocopy of the AUTHORIZATION and request form shall be as valid as the original. In all circumstances, my authorized agent or I may request a copy of this AUTHORIZATION. This AUTHORIZATION may be used for a period of 24 months from the date signed, unless sooner revoked as stated in the IMPORTANT NOTICE.

**By signing and dating this application, the member requests the insurance indicated; any person proposed for insurance consents to authorize the disclosure of information to and from the providers noted in the attached IMPORTANT NOTICE; and the member and any person proposed for insurance attest to having read the IMPORTANT NOTICE and Fraud Notices indicated above, including how information is exchanged with MIB, and that to the best of their knowledge and belief, the answers provided to the questions are true and complete.**

Member's Signature **X** \_\_\_\_\_ Date \_\_\_\_\_  
(PLEASE SIGN AND DATE IN INK)

Spouse's Signature **X** \_\_\_\_\_ Date \_\_\_\_\_  
(NECESSARY ONLY IF SPOUSE COVERAGE IS REQUESTED)

**Owner Information, required if Owner is other than the applicant**  
(if Owner is a Trust, please submit a copy of the document with this application).

Full Name \_\_\_\_\_  
LAST FIRST MIDDLE INITIAL

Relationship to proposed insured \_\_\_\_\_

Mailing Address \_\_\_\_\_  
STREET CITY STATE ZIP CODE

Home Phone (\_\_\_\_\_) \_\_\_\_\_ Work Phone (\_\_\_\_\_) \_\_\_\_\_

Tax ID# \_\_\_\_\_ Date of Birth \_\_\_/\_\_\_/\_\_\_ Social Security#    -   -

Owner's Signature **X** \_\_\_\_\_ Date \_\_\_\_\_  
(NECESSARY ONLY IF OTHER THAN APPLICANT)

**Be Sure To Complete All Pages and Sign Last Page**  
**DO NOT SEND PAYMENT:** Upon approval, you will be notified of the premium due.