

Assurity® Pre-Qualification Checklist

Quick Issue Critical Illness Insurance

Before completing an application, use this checklist to determine whether your client meets basic eligibility requirements. Desired answers are indicated below. Clients must be aged 18-64.

Questions to Ask Your Client

Answer:
Eligible answer in **bold**

1. Do you have other critical illness insurance coverage?	☐ Yes	☐ No
2. Have you ever been diagnosed with or treated for any type of cancer (other than non-melanoma skin cancer)?	☐ Yes	☐ No
3. Have you ever been diagnosed with or treated for heart disease, stroke, or any serious circulatory condition?	☐ Yes	☐ No
4. Have you ever been diagnosed with or treated for any serious chronic medical condition? <i>Examples: Diabetes, kidney disease, liver disease, lung disease, HIV/AIDS, or any condition requiring an organ transplant</i>	☐ Yes	☐ No
5. Do you currently need, or have you ever needed, help or supervision to perform daily living activities? <i>Examples: Bathing, dressing, eating, walking, or managing medications</i>	☐ Yes	☐ No
6. During the past 2 years, have you been advised to have any diagnostic or screening tests that you did not complete, for which results were abnormal, or for which you are still waiting for results?	☐ Yes	☐ No



Clients must also meet height and weight requirements as outlined in the underwriting guide on the Agent Center.

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