



Important Information

New Business Applications

To help expedite new business applications submitted simultaneously with agent appointment paperwork, please include the following information and return with your appointment paperwork:

Agent Name _____

Client Name _____

Date new business application was signed _____

State in which the application was signed _____

State in which the client resides _____

Type of business written _____

Pre-Appointment States

The following states require an appointment at the time of solicitation:

- Alabama
- Kansas
- Kentucky
- Louisiana
- Missouri
- Montana
- Ohio
- Pennsylvania
- Puerto Rico
- Texas
- Vermont
- Washington
- Wisconsin

If business will be written in any of the above states, please ensure an appointment is already in place.

This list is subject to change without notice if state regulations change.