SafeCare Term 10

M2036121

**AMERICAN-AMICABLE LIFE INSURANCE COMPANY OF TEXAS**

[P.O. BOX 2549, WACO, TX 76702-2549 • (254) 297-2777]

**INDIVIDUAL LIFE INSURANCE APPLICATION** (Please print in black ink)

Telephone Case No:

**Proposed Insured:** [redacted] (First) L (Middle) [redacted] (Last)

Address: (No. & Street) [redacted]

City: MANCHESTER State: PA Zip Code: [redacted]

Telephone interview done (if applicable) ☐ Yes ☒ No

[redacted] Phone _____ Best time to call ☐ am ☐ pm

E-mail Address NA

| Sex | Date of Birth Mo. Day Yr | Age | State of Birth | SS# | DL# | Height | Weight |
|---|---|---|---|---|---|---|---|
| ☐ Male ☒ Female | [redacted] | 74 | PA | [redacted] | 15288948 State of Issue PA | 5'3 ft | 105 lbs |

**Occupation/Duties:** retired Hire date (MM/YY): 01/16 Annual Salary: $ $26,000.00

**Owner:** Name _____ SS# _____ Address: _____

**Payor:** Name _____ SS# _____ Address: _____

**Primary Insured:** Primary Beneficiary [redacted] SS# _____ Relationship Daughter

Contingent Beneficiary _____ SS# _____ Relationship _____

**Plan:** ST 10 **Face Amount $** 35000 ☒ Non-Tobacco ☐ Tobacco ☐ Preferred Non-Tobacco

Have you used tobacco or nicotine products in any form in the past 12 months? ☐ Yes ☒ No.....or during the past 36 months? ☐ Yes ☒ No

**Riders:** ☐ Waiver of Premium ☐ Unemployment Rider ☐ Return of Premium ☐ Other: _____

☐ Critical Illness % ☐ Child Rider (complete Form No. 3215) Units ☐ ADB $

☐ Disability Income $ ☐ Spouse Level Term $ _____

**Mode:** ☒ Bank Draft ☐ Draft 1st Prem on Req. Date ☒ Other Bank MO Modal Prem $ 116.78

**CWA:** ☐ E-Check Immediate 1st Prem ☐ Collected $

**Mail Policy To:** ☐ Agent ☐ Insured ☒ Owner

**Policy Date Request:** On Approval

Physician: Name: Heather Mitchell City/State 4314 North George St Extension, Phone: (717) 268-9088

List current prescribed medications:

**SECTION A: Health Questions-Answer Questions 1 through 4 for Proposed Insured.** ***(circle all conditions that apply)***

1. **Within the past 10 years,** have you been treated for, or tested positive for, or been diagnosed by a medical professional with:
   a. high blood pressure, high cholesterol, heart attack, angina (cardiac chest pain), angioplasty, bypass surgery or stent, pacemaker or defibrillator, cardiomyopathy, congestive heart failure (CHF), irregular heartbeat, peripheral vascular disease (PVD), carotid artery disease, or any heart or circulatory disease or disorder? ☐ Yes ☒ No
   b. stroke, transient ischemic attack (TIA), amputation caused by disease, aneurysm, hemophilia, or anemia? ☐ Yes ☒ No
   c. diabetes, cirrhosis, hepatitis, pancreas disorder, Crohn's disease, ulcerative colitis, or any digestive or liver disease or disorder? ☐ Yes ☒ No
   d. asthma, emphysema, chronic obstructive pulmonary disease (COPD), sleep apnea, or any respiratory or lung disease or disorder? ☐ Yes ☒ No
   e. cancer in any form, Hodgkin's disease, leukemia, lymphoma, multiple myeloma, or organ transplant? ☐ Yes ☒ No
   f. migraine headaches, seizures, bi-polar disorder, schizophrenia, Alzheimer's, memory loss, dementia, anxiety or depression, mental retardation, mental incapacity, mental or nervous disorder, psychiatric disorder, or a suicide attempt? ☐ Yes ☒ No
   g. any disease or disorder of the kidneys, urinary bladder, prostate, breast, reproductive organs, or sexually transmitted disease? ☐ Yes ☒ No
   h. connective tissue disease, systemic lupus (SLE), multiple sclerosis, Parkinson's, cerebral palsy, muscular dystrophy, cystic fibrosis? ☐ Yes ☒ No
   i. arthritis, paralysis of two or more extremities or any disorder of the back, joints, muscles, or nervous system? ☒ Yes ☐ No
   j. any other disease or disorder, injury, surgery, birth defect, or deformity? ☐ Yes ☒ No
   k. Acquired Immune Deficiency Syndrome (AIDS), or any immune deficiency related disorder or the Human Immunodeficiency Virus (HIV)? ☐ Yes ☒ No
2. Are you currently unemployed due to medical reasons or been prohibited from actively working full time (30 hours or more per week) at your regular occupation due to any illness, injury, or health related problem, or are you currently receiving benefits, compensation, or pension for disability? ☐ Yes ☒ No
3. Are you currently hospitalized, confined to a nursing facility, receiving Hospice Care or home health care, or do you require assistance (from anyone) with activities of daily living such as bathing, dressing, eating or toileting? ☐ Yes ☒ No
4. **Within the past 12 months,** have you:
   a. consulted a medical professional, had surgery, or been hospitalized, or had diagnostic tests (excluding HIV/AIDS) such as EKG, Xray, MRI, CAT scan? ☐ Yes ☒ No
   b. had any diagnostic testing (excluding HIV/AIDS), surgery, or hospitalization recommended by a medical professional which has not been completed or for which the results have not been received, or been referred to a medical professional? ☐ Yes ☒ No
   c. been declined, postponed, rated, or modified for life or medical insurance? ☐ Yes ☒ No

**SECTION B:** Give details to all "Yes" answers in Section A and list current medications (use COMMENTS section on back for additional space).

| Condition | Dates | Treatment | Name/Address/Phone No. of Physician/Hospital |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

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**SECTION C: Answer Questions 1 through 5 for Proposed Insured.** ***(circle all conditions that apply)***

1. Have you had a natural parent or sibling diagnosed or treated by a licensed medical professional for diabetes, kidney disease, require a major organ transplant, or been medically diagnosed with heart disease, cerebrovascular disease, internal cancer prior to age 60? (If yes, list in COMMENTS section: name, relationship, age at onset, medical condition, age if living or age at death.) ☐ Yes ☒ No
2. a. **Within the next 24 months,** do you intend to work, travel, or reside outside of the U.S. for more than 30 days? ☐ Yes ☒ No
   If yes, where? _____
   b. **Within the past 24 months,** have you made or contemplated making any flights as a pilot, student pilot, or crew member of any aircraft? ☐ Yes ☒ No
3. a. **Within the past 5 years,** have you pled guilty to or been convicted of a felony or misdemeanor (including DUI or DWI) or do you have such charge currently pending against you or have you had a driver's license suspended or revoked or is currently suspended or revoked, have you plead guilty to or been convicted of any motor vehicle violations or **within the past 6 months,** have you been on probation or parole? ☐ Yes ☒ No
   b. **Within the past 5 years,** participated in motorized racing, hang gliding, rock or mountain climbing, rodeo events, sky diving, or skin or scuba diving? ☐ Yes ☒ No
4. **Within the past 10 years,** have you used illegal drugs, or abused alcohol or drugs, or had or been recommended by a medical professional or a licensed counselor to discontinue the use of alcohol or drugs or to have treatment or counseling for alcohol or drugs? ☐ Yes ☒ No

| | |
|---|---|
| 5. Do you have any existing life or disability insurance or annuity contract? ☒ Yes ☐ No | Company TransAmerica |
| Will you replace or change an existing life or disability insurance policy or an annuity? ☐ Yes ☒ No | Policy # Unknown Coverage Amount $ 7500 |

**COMMENTS:** _____

**AGREEMENT**—I agree with American-Amicable Life Insurance Company of Texas (the Company) as follows: (1) To the best of my knowledge and belief, and with the intent to induce the Company to issue the plan of insurance, all answers and statements contained in this application are true, complete, and correctly recorded; and (2) This application, supplemental applications, addendums, amendments, questionnaires, and any policy issued on the basis of such applications shall form the entire contract; and (3) No change in this contract shall be effected without my written consent with regard to: (a) the amount of insurance; (b) age at issue; (c) classification of risk; (d) plan of insurance; or (e) benefits. If this application is declined by the Company, I will accept the return of any premium paid. Any person who, knowingly presents a false statement in an application for insurance may be guilty of a criminal offense and subject to penalties under state law.

**AUTHORIZATION**—In order to properly classify my application for life insurance, I authorize any and all physicians, medical practitioners, hospitals, clinics, medical or medically-related facilities, health plans, pharmacy benefit managers, pharmacies or pharmacy-related facilities; insurance companies and their business associates and those persons or entities providing services to the insurer's business associates which are related in any way to their insurance plans; the [MIB, LLC (MIB)] or other organization that has knowledge or records of me and my health to give such information to: (a) American-Amicable Life Insurance Company of Texas; and (b) its reinsurers. I understand that any information that is disclosed pursuant to this authorization may be redisclosed and no longer covered by federal rules governing privacy and confidentiality of health information. This medical or health information includes information on the diagnosis and treatment of mental illness, alcohol, and drug use. This also includes information on the diagnosis, treatment, and testing results related to HIV, AIDS, and sexually transmitted diseases, unless otherwise restricted by state law. I understand that I may revoke this authorization in writing at any time, except to the extent that action has been taken in reliance on this authorization or the insurance company exercises a legal right to contest a claim or the policy itself. I may revoke the authorization by sending a written revocation to the Company address of 425 Austin Ave., Waco TX 76701. I understand that if I refuse to sign this authorization to release my complete medical records, my application for insurance with the Company will be rejected.

All said sources, except the MIB, are authorized to give records or knowledge such as statements regarding hobbies, employment, criminal records or medical history that might be required to determine eligibility for insurance to any agency employed by the Company to collect and transmit data. I authorize American-Amicable Life Insurance Company of Texas to disclose any personal data gathered while processing this application. This data may be released to the following: (a) reinsuring companies; (b) the MIB; (c) other persons or groups performing services in connection with this application; or (d) any others to whom it may be lawfully required or authorized. This authorization shall remain valid for the time limit, if any, permitted by applicable law in the state where the policy is delivered or issued for delivery. A copy of this authorization shall be as valid as the original.

**ACKNOWLEDGEMENT**

I acknowledge receiving the Fair Credit Reporting Act Notice, the MIB Pre-Notice, the Terminal Illness Accelerated Benefit Rider and Confined Care Accelerated Benefit Rider Disclosure Forms, if applicable.

Signed at (City) [redacted] (State) PA Date of Application (MM/DD/YY) 8/26/2024 11:51:30 AM

[redacted]ned)
SIGNATURE OF PROPOSED INSURED

SIGNATURE OF OWNER (IF OTHER THAN PROPOSED INSURED)

SIGNATURE OF SPOUSE (IF APPLYING FOR COVERAGE)

**AGENT'S REPORT**

*I certify that I have personally asked each question on this application to the proposed insured(s), I have truly and completely recorded on the application the information supplied by him/her, and I witnessed their signature. I certify that the Accelerated Living Benefit Rider Disclosure Form, the Terminal Illness Rider Disclosure Form, the Confined Care Accelerated Benefit Rider and Chronic Illness Accelerated Death Benefit Rider Disclosure Forms have been presented to the applicant, if applicable.*

Agent's Remarks: _____

Does the proposed insured have any existing life or disability insurance or annuity contract? ☒ Yes ☐ No
Is the proposed insurance intended to replace or change any existing life or disability insurance or annuity? ☐ Yes ☒ No
Has the proposed insured applied for any life insurance or annuity in the last ninety (90) days? ☐ Yes ☒ No

Agent Signature Jon Schwartz (e-signed) Agent Printed Name JON SCHWARTZ No: [redacted] %

Agent Signature _____ Agent Printed Name _____ No: _____ %

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