

Application for:
Individual Whole Life & Limited
Death Benefit Life Insurance



SECURITY NATIONAL LIFE INSURANCE COMPANY

P.O. Box 57220, Salt Lake City, Utah 84157-0220
Telephone: (801) 264-1060 or Toll Free: 1 (800) 574-7117

SIMPLE SECURITY PLAN

Name of Proposed Insured (Print) First Initial Last			Gender	Birthdate	Age	Height	Weight	
Street Address				City		State	Zip	
Proposed Insured's Telephone Number			Social Security Number/TIN				Birth State	
Owner's Name (if other than the Proposed Insured): _____ Address: _____ City: _____ State: _____ Zip: _____ Telephone Number: _____ Relationship: _____								
Payor's Name (if other than the Proposed Insured): _____ Address: _____ City: _____ State: _____ Zip: _____ Telephone Number: _____ Relationship: _____								
Primary Beneficiary: _____ Address: _____ Telephone: _____ Relationship: _____				Contingent Beneficiary: _____ Address: _____ Telephone: _____ Relationship: _____				
Plan: <input type="checkbox"/> Simple Security Plan - Preferred <input type="checkbox"/> Simple Security Plan - Standard <input type="checkbox"/> Simple Security Plan - Modified 2 year ROP + 10%		Premium Payable: <input type="checkbox"/> EFT <input type="checkbox"/> Direct Monthly Bill <input type="checkbox"/> Debit/Credit Card <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annual <input type="checkbox"/> Annual			Face Amount: \$ _____ Premium: \$ _____ Rider Face Amount: <input type="checkbox"/> ADB \$ _____ <input type="checkbox"/> Child \$ _____			
Amount of premium paid with the application: \$ _____ (Check must be made payable to Security National Life Insurance Company).								
Please Choose a Billing Option: Select Billing Month <u>AND</u> Select Billing Day <u>OR</u> Billing Week								
Does the Proposed Insured receive Social Security, Social Security Disability, SSI, VA Retirement and/or VA Disability? <input type="checkbox"/> Yes <input type="checkbox"/> No								
Draft Upon Approval <input type="checkbox"/> Yes <input type="checkbox"/> No		Select First Billing Month: January – December _____ Select Billing Day: 1 st – 28 th _____ OR Select Billing Week: <input type="checkbox"/> 2 nd Wednesday <input type="checkbox"/> 3 rd Wednesday <input type="checkbox"/> 4 th Wednesday						
Replacement: If "Yes" to Replacement question #2, please fill out and submit required Replacement Form. 1. Do you have an existing life insurance policy or annuity contract? <input type="checkbox"/> Yes <input type="checkbox"/> No 2. If yes, will proposed insurance replace or change any existing life insurance policy or annuity contract? <input type="checkbox"/> Yes <input type="checkbox"/> No								
Proposed Insured's Physician's Name: _____ Phone Number: _____ Address: _____ City: _____ State: _____ Zip: _____								
Tobacco/Nicotine Question: Have you used tobacco and/or nicotine in any form within the past 12 months? <input type="checkbox"/> Yes <input type="checkbox"/> No								
If all medical questions 1-19 are answered "No", the Proposed Insured is eligible for the Simple Security Preferred Plan. MEDICAL QUESTIONS (Section One) – Answer all medical questions. If any medical question in Section One is answered "Yes", the Proposed Insured is not eligible for the Simple Security Plan. If all medical questions are answered "No", complete Sections Two and Three on page 2 of the application.								
Has the Proposed Insured been diagnosed, tested positive for, treated or been given medical advice by a licensed member of the medical profession for any of the following medical conditions:								
							Yes	No
1. Are you now, or within the past 30 days been treated or admitted in a hospital, nursing home, health care facility, long-term care facility, hospice care, or been advised by a licensed member of the medical profession to be confined to a bed? Have you been medically diagnosed, tested or treated by a licensed member of the medical profession with having a terminal illness resulting in death within the next 12 months?							<input type="checkbox"/>	<input type="checkbox"/>
2. Within the past 30 days, have you been medically diagnosed, tested or treated in a hospital by a licensed member of the medical profession for a seizure? ..							<input type="checkbox"/>	<input type="checkbox"/>
3. Do you need assistance or supervision with dressing, eating, personal hygiene (bathing or toilet), or transferring to or from a bed or chair?							<input type="checkbox"/>	<input type="checkbox"/>
4. Are you now, or within the past 90 days been diagnosed, tested or treated by a licensed member of the medical profession for any type of tumors or cancers, except basal cell skin cancer?							<input type="checkbox"/>	<input type="checkbox"/>
5. Have you ever been diagnosed by a licensed member of the medical profession as having Alzheimer's, dementia, ALS (Lou Gehrig's disease), sickle cell anemia, hepatitis C, cirrhosis of the liver, cystic fibrosis, brain aneurysm, or organ transplant?							<input type="checkbox"/>	<input type="checkbox"/>
6. Are you currently receiving dialysis treatment?							<input type="checkbox"/>	<input type="checkbox"/>
7. Have you ever tested positive for HIV in a test taken for the purpose of obtaining insurance? Have you ever been diagnosed as having AIDS or ARC caused by the HIV infection or other sickness or condition derived from such infection?							<input type="checkbox"/>	<input type="checkbox"/>
HOME OFFICE ADDITIONS OR CORRECTIONS								

Applicant's Name:	Social Security Number:
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MEDICAL QUESTIONS (Section Two) – Answer all medical questions.

If all medical questions in Sections One and Three are answered “No”, but question 8 in Section Two is answered “Yes”, the Proposed Insured is eligible for the **Simple Security Standard Plan**.

8. Do you use any type of insulin medication for any type of diabetes? **Yes** **No**
 If yes, how many total units per day? _____

MEDICAL QUESTIONS (Section Three) – Answer all medical questions.

If any medical questions in Section Three are answered “Yes”, the Proposed Insured is only eligible for the **Simple Security Modified Plan**.
 If more than three medical questions in Section Three are answered “Yes”, the Proposed Insured is **not eligible** for a Simple Security Plan.

Provide complete details below to all medical “Yes” answers.

Within the past 2 years, has the Proposed Insured been diagnosed, tested positive for, treated, prescribed medication or been given medical advice by a licensed member of the medical profession for any of the following medical conditions:

- | | | |
|--|--------------------------|--------------------------|
| | Yes | No |
| 9. Angioplasty, stent implant, bypass surgery, heart valve surgery or pacemaker? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Any type of tumors or cancers, except basal cell skin cancer? | <input type="checkbox"/> | <input type="checkbox"/> |
| If now cancer-free, indicate month and year you were diagnosed by a licensed member of the medical professional that you were cancer-free: ____ / ____. | | |
| 11. Brain tumor, brain disorders, TIA (mini stroke) or strokes of any kind? | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Heart disease of any type, angina, heart attack, enlarged heart, congestive heart failure (CHF), circulatory disorder, or other heart disorders or conditions? | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Lung disease, emphysema, or chronic obstructive pulmonary disease (COPD) or any other type of pulmonary or lung disease or condition? | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Kidney disease or failure, renal failure or insufficiency, liver disease, hepatitis B, disease of the pancreas or other organ failure or disease? | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. Diabetes with complications that could include: diabetic coma, insulin shock, eye disease or disorder, neuropathy, amputation, hospitalized for diabetes, take 100 units or more of insulin in a 24-hour period, or insulin use prior to age 40? | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Parkinson's disease, paralysis, multiple sclerosis, lupus, muscular dystrophy, down syndrome, cerebral palsy, epilepsy, seizures or any other neurological disorders? | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Paranoia, schizophrenia, major depressive disorder, that includes suicide attempts, hospitalization, or any other mental disorder or disease? | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Have you been advised by a licensed member of the medical professional to have tests, surgery, treatment or do you have any medical test results pending or any additional medical evaluations that have not been performed, excluding tests related to the Human Immunodeficiency Virus (AIDS virus)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Have you received medical treatment, counseling or advised by a licensed member of the medical profession regarding abuse or excessive use of: alcohol, non-prescribed drugs, prescribed drugs, narcotics or any other habit forming substance? | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. Do you use a medical appliance such as a wheelchair, walker, hospital bed or oxygen? | <input type="checkbox"/> | <input type="checkbox"/> |

If “Yes” to any Medical Question, please indicate which medical question your answer pertains to and write down all medical condition(s), medication(s) including oxygen, the dosage and duration of said medication(s).

Medical Question #	Medical Condition(s)	Medication(s) - including oxygen	Dosage	Duration (from/to)

If applying for the Child Rider – Complete this Section

Please complete the Proposed Insured Child information for each child. Answer “Yes” or “No” if the Proposed Insured Child has any of the following medical condition(s). If any of the medical questions are answered “Yes”, the Proposed Child is not eligible for the Child Rider.

Child rider cannot exceed the Base Plan or \$10,000, whichever is lower.

Has the Proposed Insured Child ever been diagnosed, tested positive for, treated or prescribed medication by a licensed member of the medical profession for any of the following medical conditions:

- | | | | | |
|--------------|--------------------|----------------------------|--------------------------------|--|
| 1. Cancer | 4. Cerebral Palsy | 7. Kidney or organ failure | 10. Lung disorder or disease | 13. Any inpatient stay, 48 hours or more (within 1 year) |
| 2. Diabetes | 5. Rheumatic fever | 8. Sickle Cell Anemia | 11. Heart problems or disease | 14. Any disorder of the brain, motor skills or seizures |
| 3. Hepatitis | 6. Down Syndrome | 9. Tested positive for HIV | 12. Any disorder of the nerves | |

Name of Proposed Insured Child	Medical Condition		Birthdate	Age	Gender (M or F)	Relationship to Applicant
	Yes	No				

Applicant's Name: _____	Social Security Number: _____
<p>NOTICE TO APPLICANT: I hereby apply to Security National Life Insurance Company in Salt Lake City, Utah, for insurance to be issued upon the truth and completeness of the answers to the above questions to the best of my knowledge, and agree that: (1) no agent has the authority to waive the answer to any question in the application; (2) no insurance will be effective until the premium for the mode selected has been paid in full and the policy delivered; and (3) the policy effective date will be the date this application is received by the company at the above address.</p> <p style="text-align: center;">MEDICAL RECORDS RELEASE AUTHORIZATION</p> <p>I hereby authorize any health care provider, including any physician, practitioner, pharmacy, prescription vendor, pharmacy benefit manager, hospital, medically-related facility, insurance company or consumer reporting agency that has my records or knowledge of me or my dependent(s) to disclose to Security National Life Insurance Company (SNL), or its authorized representative, any such records or information. Records or information may include medical records in their entirety, which may contain mental health records, (excluding psychotherapy notes), prescription drug records, use of alcohol, or use of controlled or prohibited substances and driving records. Such records or information will be used by Company personnel to determine eligibility for insurance and/or benefits. SNL may disclose such information to its reinsurer(s) or any other organization which performs services in connection with the insurance relationship, including but not limited to, the insurance agent, or as lawfully required. There may be certain circumstances under which the information received may be disclosed to third parties who are not subject to the regulations under federal health privacy law. We contractually require such persons to agree to protect the confidentiality of the information. I understand that I have the right to request access to all personal information collected and, upon written request, I may ask SNL to correct, amend or delete any incorrect personal information. A copy of the Company's "Privacy Notice and Notice of Insurance Information Practices" is available upon request.</p> <p>This authorization shall be valid for a period of two years from the date signed to determine eligibility for insurance, as permitted by applicable law in the state where the policy is issued for delivery. A photocopy of this authorization shall be as valid as the original. I understand that I, or my authorize representative may receive a copy of this authorization upon request. This authorization may be revoked upon submission of a written notice to the Home Office. If this authorization was obtained as a condition of obtaining insurance coverage, your right to revoke also is subject to the rights of the Company under any law granting the Company the right to contest a claim under the policy or the policy itself.</p> <p>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.</p> <p>Dated at _____ City _____ State Date: _____</p> <p>Proposed Insured/Applicant's Printed Name _____</p> <p>Signature of Proposed Insured/Applicant _____ Date _____</p> <p>Signature of Owner (if other than Proposed Insured) _____ Date _____</p>	

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AGENT'S STATEMENT – I certify that to the best of my knowledge:

1. I correctly asked all the Medical Questions in this application and correctly recorded all the answers given; and
2. All answers given in this application are true and complete; and
3. The signature of the Proposed Insured(s) and/or the Applicant/Policyowner (Parent/Legal Guardian) is what they are represented to be and were signed in my presence; and
4. Is the Proposed Insured an immediate family member? Yes No; and
5. I know of no factor affecting the insurability of the Proposed Insured(s) except as stated in this application; and
6. This insurance **WILL** **WILL NOT** change or replace any existing insurance policy or annuity contract.

Note: If "Will" is checked for question 6, complete required replacement forms.

Agent's Signature: _____

Agent's Printed Name: _____

Agent's Number: _____

If policy and commissions are being split between multiple agents, then each additional agent must sign and notate commission split.

Agent's Signature: _____

Agent's Printed Name: _____

Agent's Number: _____

Commission Split: _____



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Office: (801) 264-1060 • Toll Free: 1 (800) 574-7117

Applicant's Name:

Social Security Number:

**PAYOR INFORMATION AND ELECTRONIC FUNDS TRANSFER (EFT)
AUTHORIZATION AGREEMENT TO SECURITY NATIONAL LIFE INSURANCE COMPANY (SNL)**

Payor Name: _____ Phone #: _____

Payor Address: _____

Customer Name: _____

Name of Bank: _____

Address of Bank: _____

Checking Account #: _____ or Savings Account #: _____

Nine Digit Bank Transit #: _____

Credit/Debit Card #: _____ Exp.: _____ CVV#: _____

I authorize SNL to initiate debit entries to my checking or savings account, or charge my credit or debit card indicated above, and authorize the financial institution (bank) named to debit my account for payment of my SNL account(s). I understand this authorization is subject to the terms and conditions of the EFT agreement.

TERMS AND CONDITIONS

1. This arrangement may be terminated with respect to any or all contracts listed below by SNL or by me upon written notice to the other party. Until such notice is actually received by SNL, SNL shall be fully protected in drawing the EFT.
2. I understand that if any EFT is dishonored by my bank and if any monthly amount due SNL is not paid within the time stipulated on the contract, the contract shall lapse except as otherwise provided therein.
3. During the continuance of this arrangement SNL shall not be required to send payment notices on any contract I have authorized to be included hereunder.
4. If I change banks or bank accounts and I want to continue using EFT, I must sign a new Authorization Agreement.
5. This authorization shall not be effective for any contract for which an application is pending, unless and until such contract is actually issued and the down payment there under paid in cash to SNL.
6. I will pay a returned-item fee as specified by the bank or SNL for any debit entry that is returned to SNL for insufficient funds.
7. The EFT will apply to the following contract(s):

Name: _____ Contract #: _____

Name: _____ Contract #: _____

Date: _____ Signature: _____

Authorized Account Holder

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CONDITIONAL RECEIPT

THIS RECEIPT DOES NOT PROVIDE ANY INSURANCE UNTIL AFTER ITS CONDITIONS ARE MET.

Received from _____ on _____ (date) the sum of \$ _____, the correct first premium specified in the application, subject to the following conditions:

FIRST: If each Proposed Insured would be acceptable and approved by Security National Life Insurance Company, Salt Lake City, Utah, as insurable under the Company's underwriting rules for insurance on the plan, at the rate and in the amount applied for the insurance on all Proposed Insured(s) shall become effective as of the application date.

SECOND: If any Proposed Insured be not acceptable to and approved by Security National Life Insurance Company, Salt Lake City, Utah, as above specified, then no insurance shall become effective on any Proposed Insured except as stated in the application and the Company shall incur no liability hereunder except to return the amount shown by this receipt.

THIRD: We will, within 60 days of the date this Application, provided you with your policy, or notify you as to whether or not your Application was accepted, and will give you reason for any further delay.

Agent's Signature

Agent's Name (Please Print)