

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

**SECURITY CARE PLAN**

<b>Name of Proposed Insured (Print)</b> First Initial Last			Gender	Birthdate	Age	Height	Weight
Street Address				City		State	Zip
Proposed Insured's Telephone Number			Social Security Number/TIN				Birth State
<b>Owner's Name (if other than the Proposed Insured):</b> _____							
Address: _____		City: _____		State: _____		Zip: _____	
Telephone Number: _____				Relationship: _____			
<b>Payor's Name (if other than the Proposed Insured):</b> _____							
Address: _____		City: _____		State: _____		Zip: _____	
Telephone Number: _____				Relationship: _____			
<b>Primary Beneficiary:</b> _____				<b>Contingent Beneficiary:</b> _____			
Address: _____				Address: _____			
Telephone: _____ Relationship: _____				Telephone: _____ Relationship: _____			
<b>All Premiums are Level</b>			<b>Premium Payable:</b>			<b>Face Amount: \$</b> _____	
Class: <input type="checkbox"/> Select <input type="checkbox"/> Special <input type="checkbox"/> Limited			<input type="checkbox"/> EFT <input type="checkbox"/> Direct Monthly Bill <input type="checkbox"/> Debit/Credit Card			Premium: \$ _____	
Payment: <input type="checkbox"/> 10-Pay <input type="checkbox"/> 20-Pay <input type="checkbox"/> Whole Life			<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-Annual <input type="checkbox"/> Annual			<b>Rider Face Amount:</b>	
Amount of Premium paid with the Application: \$ _____						<input type="checkbox"/> ADB \$ _____	
(Check must be made payable to Security National Life Insurance Company).						<input type="checkbox"/> Child \$ _____	
<b>Please Choose a Billing Option: Select Billing Month <u>AND</u> Select Billing Day <u>OR</u> Billing Week</b>							
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							
<b>Draft Upon Approval</b> <input type="checkbox"/> Yes <input type="checkbox"/> No		<b>Select First Billing Month:</b> January – December _____					
		<b>Select Billing Day:</b> 1 <sup>st</sup> – 28 <sup>th</sup> _____ <b>OR</b> <b>Select Billing Week:</b> <input type="checkbox"/> 2 <sup>nd</sup> Wednesday <input type="checkbox"/> 3 <sup>rd</sup> Wednesday <input type="checkbox"/> 4 <sup>th</sup> Wednesday					
<b>Replacement: If "Yes" to Replacement question #2, please fill out and submit required Replacement Form.</b>							
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	
<b>Proposed Insured's Physician's Name:</b> _____				Phone Number: _____			
Address: _____		City: _____		State: _____		Zip: _____	
<b>Please answer all Medical Questions for the Proposed Insured</b>							
If all answers to the Medical Questions in all 3 sections are "NO", then the Proposed Insured qualifies for Select Class							
<b>Section I – Any "Yes" answers, Proposed Insured is not eligible for coverage.</b>							
<b>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:</b>							
						Yes	No
1. Have you ever been diagnosed, tested or treated by a licensed member of the medical profession as having Alzheimer's disease, dementia, hepatitis C, ALS (Lou Gehrig's disease), or 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. Have you been diagnosed, tested or treated by a licensed member of the medical profession for an organ transplant, dialysis treatment, cystic fibrosis, cirrhosis of the liver or sickle cell anemia? .....						<input type="checkbox"/>	<input type="checkbox"/>
3. 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"/>
4. In the past 5 years have you been treated for alcohol or drug addiction or abuse (including prescription drugs) by a licensed member of the medical profession? .....						<input type="checkbox"/>	<input type="checkbox"/>
5. In the past 2 years been diagnosed, tested or treated by a licensed member of the medical profession for any internal cancer, melanoma or brain tumor? .....						<input type="checkbox"/>	<input type="checkbox"/>
6. In the past 2 years been diagnosed, tested or treated by a licensed member of the medical profession for any type of heart disease, CHF, heart attack or heart surgery? .....						<input type="checkbox"/>	<input type="checkbox"/>
7. In the past 2 years been diagnosed, tested or treated by a licensed member of the medical profession for any type of stroke, brain aneurysm, seizure, any other brain disorders or suicide attempt? .....						<input type="checkbox"/>	<input type="checkbox"/>
8. Are you now, or within the past 30 days been treated or admitted in a hospital, nursing home or any other type of health care facility, hospice care or been advised by a licensed member of the medical profession to be confined to a bed? .....						<input type="checkbox"/>	<input type="checkbox"/>
9. 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"/>
HOME OFFICE ADDITIONS OR CORRECTIONS							

Applicant's Name:

Social Security Number:

**Section II – Any “Yes” answers, Proposed Insured qualifies for Special class.**

In the past five 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                       |
| 10. Diabetes with no complications, good control, takes under 100 units of insulin in a 24-hour period and was diagnosed with diabetes after age 40? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Lung disorders, emphysema, asthma or COPD? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Chest pain, heart attack, heart surgery, other heart or circulatory disorder, including uncontrolled high blood pressure (takes more than 2 medications), takes blood thinning medication, brain aneurysm or stroke? ..... | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Diagnosed, tested or treated by a licensed member of the medical profession for any internal cancer, melanoma or brain tumor? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Recovered alcohol or drug abuser? If applicable, list date of recovery: .....  | <input type="checkbox"/> | <input type="checkbox"/> |

**Section III – Any “Yes” answers, Proposed Insured qualifies for Limited Death Benefit Plan.**

In the past five 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                       |
| 15. Diabetes with complications, including retinopathy, neuropathy, amputation onset of diabetes under age 40, but not on dialysis? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Disease of the liver, kidney, pancreas, other internal organs or hepatitis B? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Parkinson's disease, paralysis, multiple sclerosis, lupus, muscular dystrophy, epilepsy, seizures or any other neurological disorders? .....   | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Paranoia, schizophrenia, major depressive disorder, suicide attempts, hospitalization, or any other mental disorder or disease? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Congestive heart failure (CHF), heart attack, circulatory disorder, or other heart disorders or conditions? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. Brain tumor, brain disorders, TIA (mini stroke) or strokes of any kind? .....  | <input type="checkbox"/> | <input type="checkbox"/> |
| 21. <b>Within the last 2 years</b> , have you ever 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"/> |
| 22. 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:**

**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.

**MEDICAL RECORDS RELEASE AUTHORIZATION**

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.

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 delivered. 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.

**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.**

Dated at \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Date: \_\_\_\_\_

Proposed Insured/Applicant's Printed Name \_\_\_\_\_

Signature of Proposed Insured/Applicant \_\_\_\_\_ Date \_\_\_\_\_

Signature of Owner (if other than Proposed Insured) \_\_\_\_\_ Date \_\_\_\_\_

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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 Number: \_\_\_\_\_

Agent's Printed Name: \_\_\_\_\_

Commission Split: \_\_\_\_\_



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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)