

AGENT & CASE INFORMATION

AGENT NAME

PHONE

E-MAIL

PROPOSED INSURED

CLIENT NAME

DATE OF BIRTH

STATE

HEIGHT

WEIGHT

FACE AMOUNT

Sex: ☐ Male ☐ Female

Tobacco / Nicotine Use: ☐ Yes ☐ No

COVERAGE REQUESTED

Type of Insurance: ☐ Universal Life ☐ Whole Life ☐ Survivorship

☐ Term — number of years:

QUESTIONNAIRE

1. Which motor vehicle related incidents has the proposed insured had in the past 10 years? Include all information.

MOVING VIOLATION

Date of arrest	Date of conviction	Date of license suspension / revocation	Date of license reinstatement

Details, including any dismissal or court ordered requirements:

RECKLESS DRIVING

Date of arrest	Date of conviction	Date of license suspension / revocation	Date of license reinstatement

Details, including any dismissal or court ordered requirements:

DWI / DUI

Date of arrest	Date of conviction	Date of license suspension / revocation	Date of license reinstatement

Please e-mail the completed form to Brad Kadelski · brad@brookfieldpartners.com

Brookfield Insurance Partners, LLC · Brookfield, MA · (p) 866-639-0443 · info@brookfieldpartners.com · www.brookfieldpartners.com

Details, including any dismissal or court ordered requirements:

LICENSE SUSPENSION OR REVOCATION

Date of arrest	Date of conviction	Date of license suspension / revocation	Date of license reinstatement

Details, including any dismissal or court ordered requirements:

2. Date of last alcohol use:

Any relapses from previous attempts to stop drinking?

☐ Yes ☐ No

3. Has the proposed insured ever been advised by a doctor to stop or decrease their alcohol use?

☐ Yes ☐ No

4. Has the proposed insured attended any alcohol treatment programs?

☐ Yes ☐ No

If yes, provide name and type (in-patient or out-patient):

5. Does the proposed insured attend AA?

☐ Yes ☐ No

6. Probation dates:

PROBATION START DATE

PROBATION END DATE

7. Has the proposed insured had a breathing device on their vehicle?

☐ Yes ☐ No

If yes, provide the dates:

DATE OF INSERTION

DATE OF REMOVAL

8. Any history of drug convictions?

☐ Yes ☐ No

If yes, provide details: