Epi-Digm©
Financial & Insurance Marketing

# Fast Quote

Fax: (714) 242-1983
Email: skim8558@hotmail.com

## SERVICES WE CAN OFFER:

Epi-Digm©'s broad array of client-focused solutions offers individuals and families and the small business owner the tools they need to help them meet both today and tomorrow's financial demands.

### Insurance Protection
- Life Insurance
- Critical Illness Insurance
- Disability Insurance
- Long-Term Care Insurance
- Health & Medical Insurance
- Group Benefit Plans

### Retirement Planning
- IRAs
- Annuities
- SEP / 401K

### Estate Planning
- Wealth Transfer Strategies

### College Funding Plans
- 529 Plan
- Educational Savings Account

### Mortgage Products & Services
- Fixed Rate Mortgages
- Adjustable Rate Mortgages
- Interest-Only Programs
- Home Equity Line Of Credit (HELOC)

## CLIENT INFORMATION

Name: first & middle _____ last _____ Sex: Male / Female

Ht.: ___ ft. ___ in. Wt.: _____ lbs. Birthday: ___/___/_____ (Age:_____) Birth Place: _____

Citizen of: _____ Smkr?: Yes / No - since 19____

Health History (check one: Excellent Fair Poor)

Comments _____

Address: *street* _____

*city* _____ *county* _____ *state* _____ *zip* _____ *telephone #* (___) _____

Remarks: *(e-mail, health & hazardous Activities, etc.)* _____

## FOR ILLUSTRATION

Plan Type: Term / UL-EIUL / VUL / Survivorship / Critical Illness / Medical / Other _____

Face Amount: $_____ (option level / increasing) Rider(s): _____

Planned Premium: $ _____/( month / ½-year / year) through age: _____ - *or* - for ____ years

Additional Premium: $ _____ 1035 / Non-1035_____

## AGENT INFORMATION

*Name:* _____ *Agt. #:* _____ *BM #:* _____