

Preparing for your Accelerated Underwriting call

The Telephone Interview

A telephone interview will be conducted by a courteous insurance professional and whenever possible, on the day and time you requested. Your responses will be used to complete your life insurance application. The typical interview lasts 20-30 minutes.

To help keep your interview as short as possible, having the following information will be helpful:



- ✓ Your **driver's license** and, if applicable, other form of government-issued identification (example: permanent resident cards, visa, etc.)
- ✓ Names, addresses, and phone numbers of **doctors and clinics you visited in the past five years**
- ✓ The names and dosages of **any prescription or over-the-counter medications** you take
- ✓ A **list of medical conditions** or diagnoses, including date of diagnosis, treatment, result of treatment, and treating physician information
- ✓ Payment information to activate policy*
 - Visa or Mastercard information accepted for initial premium
 - Bank routing and account number for premium payment via EFT

Thank you for choosing SBLI. Rest assured all personal information you provide will remain strictly confidential. Contact your agent with any questions.

* When a policy is approved as applied, payment via credit card or EFT will automatically draft at the time of issue. The Savings Bank Mutual Life Insurance Company of Massachusetts, Woburn, MA. Products and features may not be available in all states. © 2017 All rights reserved. NAIC #70435. The Savings Bank Life Insurance Company of Massachusetts has become a mutual life insurance company and is making regulatory filings in all jurisdictions in which it is licensed to use its new legal name The Savings Bank Mutual Life Insurance Company of Massachusetts. States that have approved our new legal name can be found at www.sblibrokerage.com/mutual. 17-4004 10/17

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