

Core Life: Interview Tips



You've submitted your insurance application, what's next? Preparing for your interview may seem stressful - here are some tips.

What to Expect:

PREPARING FOR THE INTERVIEW

Your interview will last approximately 45 minutes. The purpose of the interview is to assist with the underwriting of your policy

SCHEDULING TIPS

Interview questions will relate to health history and financial information, so be sure to complete the interview at a time and place you will have privacy.

COGNITIVE ASSESSMENT

Cognitive assessments may be requested for individuals who are 56 or older (cognitive test ages are based on carrier requirements).

Information to Bring:

- PHYSICIANS' NAME & ADDRESS
- HEALTH CONDITIONS & MEDICAL DIAGNOSES
- RESIDENCE & LIVING ARRANGEMENTS
- MEDICATIONS & MEDICAL HISTORY
- EMPLOYMENT STATUS
- HOBBIES & SOCIAL ACTIVITIES
- HOSPITALS & MEDICAL FACILITIES
- EXISTING INSURANCE & ANNUITY INFORMATION
- FINANCIAL INFORMATION

After the Interview:

Once the interview is complete, the underwriter will review the information

