

New Business Checklist

Final Expense - California

Important Information:

- ***Prior to the sale:*** If a meeting to discuss life insurance will take place in a senior's home, provide the **Notice of Meeting in a Senior's Home, Form No. CA 65 Meeting Notice**, to the senior at least 24 hours before the meeting is to take place.

For paper applications:

- Submit completed Application Form No. A615CA-CL.
- If the Children's Term Insurance Rider is being applied for, submit Supplemental Application for Children's Term Insurance Rider, Form No. A614CA-CL.
- If the Applicant is age 65 or older:
 - If you discuss Medi-Cal eligibility in connection with the sale of a life insurance policy, provide the Applicant with the Notice Regarding Standards for Medi-Cal Eligibility, Form No. 4540CFG.
 - Provide the Applicant with the Important Notice Regarding the Sale or Liquidation of Assets, Form No. 4541CFG.
- If a replacement is occurring, complete Replacement Form 1503CFG. Provide a copy to the Applicant and submit a signed copy to the Company.
- If the initial premium is being submitted with the application, submit a personal check, cashier's check or money order from the Applicant made payable to Columbian Life Insurance Company. If premium will be paid by bank draft, include a voided check or deposit slip if available. **The Company will not accept an Agency or Agent's personal check or any post-dated check.**

For electronic applications (E-App):

- If the application is being submitted electronically, provide the Applicant with the applicable required disclosure documents from the E-App Disclosure Packet, Form No. 5354CFG-CA.

For New Business questions, call 800-423-9765 ext. 4902
For Underwriting questions, call 800-423-9765 ext. 5904

COLUMBIAN MUTUAL LIFE INSURANCE COMPANY
Home Office: Binghamton, NY
Administrative Service Office: PO Box 1381
Binghamton, NY 13902-1381

COLUMBIAN LIFE INSURANCE COMPANY
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Administrative Service Office: PO Box 1381
Binghamton, NY 13902-1381

Columbian Life Insurance Company is not licensed in every state.