



4299 Five Oaks Drive
 Lansing, MI 48911
 Phone: (517) 482-7900
 Fax: (517) 482-1696

CAPITAL INSURANCE SERVICES

www.capitalinsurance.com

Life & Annuities Quote Sheet

Name: _____ Spouse Name (if applicable): _____

Phone: _____ E-Mail: _____

Address: _____ City: _____ State: _____ Zip: _____

Date of birth: ____/____/____ Height: _____ Weight: _____

(Spouse) Date of birth: ____/____/____ Height: _____ Weight: _____

Please include coverage for my dependent children (ages 15 days to 17 years).

Number of children: _____ Age of youngest child: _____

Life Insurance Requested		Amount Requested		Guarantee Period	
Term Life		\$50,000		10 years	
Whole Life		\$100,000		15 years	
Universal Life		\$250,000		20 years	
Variable Life		\$500,000		30 years	

Have you ever used tobacco or nicotine substitutes? (If yes, please explain): _____

Is there anything significant about your family health history? (If yes, please explain): _____

Do you take any medication? (Please provide dosage and frequency): _____

Have you ever taken an antidepressant medication or received counseling? _____

Annuities

Do you have a bank CD or IRA maturing? Did you know many of our company's annuities are paying a higher rate of return than the banks? No employer 401K or Pension Plan? Look at our companies Traditional or Roth IRA annuities.

- Minimum deposit is \$50 or \$25 if done monthly
- Interest is compounded annually and posted daily
- Annuities may be more liquid than a CD with no tax interest until surrendered. Up to 10% may be withdrawn in any given year without a surrender charge (5 years after the contract is in effect and the annuitant reaches age 60. Cash value may be withdrawn without a surrender charge penalty.)