



Insurance Services Since 1974

CPS Insurance Services CPS INFORMAL INQUIRY CHECKLIST

This checklist is an aid to make processing of Informal Inquiries more efficient and to provide the CPS Underwriting Department with all the necessary information upfront when assisting with cases that have received adverse underwriting decisions. Please be sure to include this checklist with all Informal Inquiries and provide all the information requested as completely as possible.

- Signed and fully completed Informal Inquiry Form
- Paramed Exam, Lab/Lab Ticket and APSs (if available)
- List all carriers that have seen the case formally/informally and include the quote/offer made
- Include reason for declination or rating with other carriers
- List any particular carriers you would like the case sent to
- Provide the annual premium or offer that you need for the case to be placed
- Will there be any premium dump in or 1035 exchange funds (please provide this amount)

Thank you for your business.

Lisa Skaw

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CPS-Reliable Financial Group

**A CPS Insurance Services, Inc. Affiliated Office
Companies, Products, and Services**

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