

LIFE INSURANCE GUIDE FOR BENEFICIARIES

Taking the Next Steps is a Bankers Life guide designed to help families prepare and plan for the loss of a loved one. The guide provides instructions on how to plan for final expenses, insight into the probate process and helpful checklists and advice.

Assisting loved ones at time of death

- » Provides a list of parties that should be contacted
- » Gives sample letters to assist in communicating the loss to these parties
- » Explains payout options available in the life insurance contract
- » Offers insight into Bankers Life cash payout option via a BenefitNOW Account®

Planning for final expenses

- » Provides general guidance on decisions related to final expenses
- » Supplies a checklist for funeral planning and other important documents

As a valued life insurance customer, Bankers Life would like to share with your beneficiary a copy of our *Taking the Next Steps* booklet, and review it with him/her. Your relationship with Bankers Life is confidential and we value the trust you place in us. We will not contact your beneficiary unless you authorize us to do so.

Yes, I would like Bankers Life to share this important information with my beneficiary to help them prepare. I authorize Bankers Life to disclose to the individual identified below that I'm a Bankers Life customer and have named them as my life insurance beneficiary.

Not at this time. I'd prefer you ask me again at a later date.

PRINTED BENEFICIARY NAME: _____

BENEFICIARY TELEPHONE: _____

BENEFICIARY EMAIL: _____

BENEFICIARY HOME ADDRESS: _____

PRINTED NAME: _____

SIGNATURE: _____

DATE SIGNED: _____

POLICY NUMBER: _____

Bankers Life is the marketing brand of Bankers Life and Casualty Company, Medicare Supplement insurance policies sold by Colonial Penn Life Insurance Company and select policies sold in New York by Bankers Conesco Life Insurance Company (BCLIC). BCLIC is authorized to sell insurance in New York.

