

We've simplified the life insurance application process

This checklist will help you prepare to take full advantage of our accelerated experience.

Ready

Information to have on hand to help make the application process as smooth and efficient as possible:

- Personal Physician Information (including date and reason last seen)
- Medical Information (including tests, treatment, medication, and/or diagnosis of specific conditions)
- Immediate Family Medical History (including tests, treatment and/or diagnosis of specific conditions)
- Lifestyle Information (including participation in various activities)
- Personal Financial Information (including sources for premium payment)
- Policy numbers and details of any existing Life Insurance policies In Force or Applied For

Set

Online profile and application activities will require the following:



Valid email address



High-speed internet connection



Desktop, laptop, tablet, or smartphone with compatible browser



Acrobat Reader 8 or above, or similar software to view and print PDF files

Go!

Let's get started!

Accelerated Client Experience

Simple. Fast. Convenient. Secure.



Create Penn Mutual Profile

To access our electronic application, first you'll need to create a Penn Mutual Profile.



Information Collection

Next, we'll need some general information about you, like your address and other contact information.



My Life & Health

Here, we'll get into the details about your lifestyle and health history (see the reverse side of this flyer for the kind of information we'll ask you about).



Application Submission

After you and your adviser have completed all sections of the application, you can sign and have your adviser officially submit your application for life insurance with Penn Mutual!



Information Security

The modern security measures we have in place ensures that your personal information is safe and protected at all times.

Need help?

Contact your advisor for more information.