

# Linked Benefit Quote Request Form



Please print legibly, failure to do so may result in incorrect or delayed quote delivery.

Date: \_\_\_\_\_

## AGENT INFORMATION

Name: Nancy Puzel Telephone: 408-244-2448 Ext.: \_\_\_\_\_  
Agent License Number (mandatory for FL and CA financial professionals): 0E71106  
Company Name: Lincoln Financial Advisors Affiliation: \_\_\_\_\_  
Email: Nancy.Puzel@LFG.com

## CLIENT INFORMATION

Name: \_\_\_\_\_  Male  Female  
Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Smoker:  Yes  No  
Marital Status: \_\_\_\_\_ Is Client's Spouse Applying?  Yes  No  
Discounts may apply even if spouse is not applying.

If spouse is applying, please provide the following information:

Spouse's Name: \_\_\_\_\_  Male  Female  
Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Smoker:  Yes  No  
Client's Resident State: \_\_\_\_\_ State where application will be signed: \_\_\_\_\_  
If an application is signed in a state other than the client's resident state, a valid reason must be included.

## POLICY OPTIONS

Hybrid Policy Type:  Life  Annuity  Both

Premium Deposit: \_\_\_\_\_

Nursing Home Monthly Benefit: \$ \_\_\_\_\_

Premium:  Qualified  Non-Qualified 1035 Exchange:  Yes  No

Benefit Period: \_\_\_\_\_ Years

Inflation Protection Option:  Yes  No If yes, what inflation rate is desired? \_\_\_\_\_%

Payment Period:  Single Pay  Flex Pay \_\_\_\_\_ # of years  Life Pay

I would like Crump to design a plan.

I would like Crump to call me to discuss available long term care insurance options.

Special Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Note:** Crump will only quote a standard rate unless a completed [Medical History Form](#) is provided along with this Quote Request Form. Applications and brochures can be downloaded on [Crump.com](#)—select LTC, then Forms.

Please send this completed Quote Request Form in an encrypted email to [lrcquotes2@crump.com](mailto:lrcquotes2@crump.com) or fax to **800.394.3297**. If you have additional questions, please contact the Crump LTC Solution Center Sales Desk at

800.678.4582, opt 3, opt 3

[lrcquotes2@crump.com](mailto:lrcquotes2@crump.com)



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