

Life Insurance Exam Checklist

Order Exam:

If your client lives in or around Kansas City, Columbia, Branson, Joplin, or Lake of the Ozarks, you will call the Kansas City office of APPS Portamedic (816) 214-4974.

If your client lives in the St. Louis area, you will call the St. Louis office of APPS Portamedic (314) 892-1200.

Please tell them you want this order to be attached to an Agency. The Agency name is Mo-Kan.

You will also need to know your Columbus Life agent code.

Let them know you have the client with you, and that you want to go ahead and schedule the exam. They will ask the following questions:

- Name of client
- Date of birth
- Type (term or universal life) of insurance applied for
- Amount of insurance applied for
- Address
- Social Security Number
- Phone number

Exam Preparation: Do's and Don'ts

DO

- Get a good night's sleep
 - Ensures the best resting pulse and blood pressure
- Stay hydrated
 - Drink a glass of water 1 hour before the exam
 - Makes for an easier blood draw
- Document medications
 - Prescription and over-the-counter medications including vitamins, herbs and supplements
- Notify of any past blood draw issues

DON'T

- Consume salt and high-cholesterol foods (24 hours prior)
 - May affect exam results
- Participate in any strenuous exercise (12 hours prior)
 - Working out excessively may release protein into the urine and elevate liver function tests
- Drink alcoholic beverages (12 or more hours prior)
 - Alcohol may cause dehydration and liver function test elevation
- Use nicotine or caffeine (at least 1 hour prior)
 - Both are stimulants and may elevate heart rate
 - Black coffee is acceptable up to 1 hour before the exam