

Lincoln MoneyGuard® Reserve

Personal History Interview Instructions

Instructions should be left with the client to prepare for the Personal History Interview. This information DOES NOT need to be sent back to Lincoln!

Dear valued prospective Lincoln MoneyGuard Reserve client:

Preparing in advance for your telephone interview will expedite the interview process. Please complete the Pre-interview worksheet (immediately following this section) prior to your interview. Please allow at least 45 minutes to complete the interview. It will be beneficial for you to be in a place where you are alone and free from distractions.

If you are taking medication, please have your prescription bottles handy for the interview process, so that it will be easy for you to provide the name and dosage of the medication.

Please be prepared to confirm your Social Security number, and the Social Security numbers or tax I.D. numbers of the individuals/entities that will be the owner and beneficiary(ies).

Also, please be ready to confirm your existing life insurance policy information. We'll verify company names, coverage amounts, dates of issue, and if you are replacing the policies, the policy numbers.

You will be asked about your medical history including diagnoses, symptoms, and conditions for which you are or have been treated. Be sure you are prepared to give detailed information about your health.

This interview will require your participation in a series of memory exercises. The outcome of your application will be based on the information given during this interview only. Be sure you take your time and give it your full attention. Lincoln will not contact your doctor or access your medical records in order to make an underwriting offer.

We look forward to our upcoming conversation and thank you for applying for Lincoln MoneyGuard Reserve.

Lincoln Financial Group

Not a deposit
Not FDIC-insured
Not insured by any federal government agency
Not guaranteed by any bank or savings association
May go down in value

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PEM 9/09 Z01

Order code: MGR-PHI-BRC001



Hello future.®

Preinterview worksheet

Important numbers

Your Social Security number

Additional owner information

If you are not the owner of the policy, please provide the Tax ID or the Social Security number of whoever the owner will be.

Number

Existing life insurance information

Please list every life insurance policy you currently have in-force AND any life insurance you've applied for which has not yet been issued. Please use another piece of paper if there is not enough room in the space provided.

Company name	Policy number (if available)	Issue date	Face amount

Third party designation (to receive grace period of lapse notices)

Name	Address	Phone number

Beneficiary(ies)

	Beneficiary (1)	Beneficiary (2)
Name		
Social Security number		
Relationship		
Trust name		
Trustee name(s)		
Date of trust		
Contingent name		
Social Security number		
Relationship		

Medications

Please provide the following information about the prescription medication you are currently taking, including vitamins and herbal supplements.

Prescription name	Dosage and frequency
1	
2	
3	
4	
5	
6	

Social history

Type of residence	Tobacco use	Alcohol use

Medical history

Please list any medical conditions you have or have ever been diagnosed with. Please use a separate sheet of paper if there is not enough room in the space provided.

Condition	Date of diagnosis	Symptoms	Type and date of treatment	Tests done and results	Date of last doctor visit
1					
2					
3					

Have you had to alter any of your daily activities? Please check Yes or No.

Do you need assistance with:

Cooking Yes No

Continence Yes No

Dressing Yes No

Yard work Yes No

Shopping Yes No

Cleaning Yes No

Carrying groceries Yes No

Do you participate in any recreational activities? If so, what are they?

If you have any of the following conditions, please be ready to provide the following information.

Breast cancer	Size of tumor	Stage	Lymph node involvement	Type of treatment	
Prostate cancer	Pretreatment PSA	Gleason score	Stage	Type of treatment	Posttreatment PSA
Colon cancer	Dukes staging	Lymph node involvement			
Diabetes	Age of diagnosis	Type of treatment	Fasting blood glucose	Blood HgA1C	Confirmation of any of the following: retinopathy, neuropathy, nephropathy
Coronary heart disease	Bypass surgery <input type="checkbox"/> Yes <input type="checkbox"/> No	How many vessels	Angioplasty with or without stent <input type="checkbox"/> Yes <input type="checkbox"/> No	Heart attack <input type="checkbox"/> Yes <input type="checkbox"/> No	Last stress test and results

Important disclosures. Please read.

Lincoln *MoneyGuard*[®] Reserve is a universal life insurance policy with a rider that accelerates the specified amount of death benefit to pay for covered long-term care expenses. The cost of riders will be deducted from the policy value. **Guarantees are backed by the claims-paying ability of the issuer and are subject to policy terms and conditions.** The insurance policy and riders have limitations, exclusions, and/or reductions.

Lincoln *MoneyGuard*[®] Reserve is issued by The Lincoln National Life Insurance Company, Fort Wayne, IN, on Policy Form LN850 (8/05) with a Convalescent Care Benefits Rider (CCBR) on Rider Form LR851 (8/05). **The Lincoln National Life Insurance Company does not solicit business in the state of New York, nor is it authorized to do so. Contractual obligations are backed by the claims-paying ability of The Lincoln National Life Insurance Company.**

Policies sold in New York are issued by Lincoln Life & Annuity Company of New York, Syracuse, NY, on Policy Form LN850 (8/05) with a Convalescent Care Benefits Rider on Rider Form LR851 (8/05). **Contractual obligations are backed by the claims-paying ability of Lincoln Life & Annuity Company of New York.**

Products and features, including benefits, exclusions, limitations, terms, and definitions, may vary by state.