

# STATEMENT OF UNDERSTANDING

EMPLOYEE NAME \_\_\_\_\_ DOB \_\_\_\_\_

SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ GOVT AGENCY \_\_\_\_\_

HOME PHONE (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ WORK PHONE (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

PLACE OF WORK \_\_\_\_\_ PERSONNEL OFFICE \_\_\_\_\_

## I UNDERSTAND THAT:

1. A representative from the home office of the insurance company will be calling me to verify certain information.

The best time to reach me is \_\_\_\_\_ at \_\_\_\_\_.  
(Time) (Home/work)

2. \_\_\_\_\_ is an insurance agent representing  
(Agent name)  
\_\_\_\_\_, and is not affiliated with the Federal Government.  
(Insurance Company)

3. The Federal Government does not endorse or sponsor the **individual life and/or disability insurance policy** that I am purchasing at this time, and it is not meant to replace or change my FEGLI **group life policy**.

4. My biweekly deduction is \$\_\_\_\_\_ per pay period and will not change unless I authorize the change.

5. My illustration will be mailed to me within **7-10** business days. If I do not have any questions or changes, I will automatically be processed.

6. I authorize Client Services to process my bi-weekly deduction either by using my postal ease and employee ID number or my signed allotment form.

7. I authorize Client Services to restart my government/federal/payroll allotment, should it inadvertently stop due to an error or changes to my work status. I acknowledge that this authorization can be rescinded/cancelled by me, at any time, with a signed letter.

8. My representative has informed me that all personal information is protected by the *Privacy Act of 1974* as well as Client Services privacy regulations and practices.

I hereby verify that I have thoroughly read the above information and have completed it to the best of my knowledge and understanding.

**NOTICE: BY SIGNING THIS DOCUMENT, I UNDERSTAND THAT I AM APPLYING FOR INSURANCE TODAY.**

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

Signature of Agent \_\_\_\_\_ Date \_\_\_\_\_