

**California Applicant (65 Years or Older)
Verification of Disclosure Statements**

I acknowledge and attest that I have been advised by the undersigned agent the following (initial all that apply):

1. _____ **Advisement of Consequences in the Sale or Liquidation of Assets:**
(Senior's Initials) I have been advised by the undersigned Agent in writing that the sale or liquidation of any stock, bond, IRA, certificate of deposit, mutual fund, annuity, or other asset to fund the purchase of this life insurance product may have tax consequences, early withdrawal penalties or other costs or penalties as a result of the sale or liquidation. I have also been advised by the agent to consult independent legal or financial advice before selling or liquidating any assets, and prior to the purchase of any life insurance products being solicited, offered for sale, or sold.

2. _____ **At home pre-solicitation notice:** If the sale of these life insurance products were conducted in my home, I received, no less than 24 hours prior to the agent's visit, or if I have an existing insurance relationship with the agent and requested the meeting the same day, just prior to the meeting, I received, written notice informing me of the pertinent details surrounding the products I was going to be presented, my rights to have others present at the presentation, my rights to contact the Department of Insurance for information or to file a complaint, and the names, title and insurance license information of all individuals coming to my home.

Signature of Proposed Insured _____ Date: _____

Print Name: _____ Date of Birth: _____

I attest that I have advised and provided the above-signed proposed insured (applicant) the above notices as written.

Signed _____ Date: _____

Print Agent Name: _____

Please make copies for relevant parties as appropriate.