

California Disclosure Notice to Persons Age 65 and Older

Note Instructions to Agent/Broker: Please insert the appropriate information below. This notice must be presented no less than 24 hours prior to initial meeting if meeting is to be held in Applicant/Prospective Owner/Insured's home. If other than initial meeting in Applicant/Prospective Owner/Insured's home and request for meeting in Applicant/Prospective Owner/Insured's home was initiated same day by Applicant/Prospective Owner/Insured, this notice must be delivered prior to meeting.

The following information is being presented to you in compliance with California Insurance Code Section 789.10:

This Notice confirms that I will be meeting with you at your home on _____, 20____ at _____ a.m. / p.m. to talk about insurance, or to gather information for a follow up visit to sell insurance.

During this visit or follow up visit, you will be given a sales presentation on life insurance.

You have the right to have other persons present at the meeting, including family members, financial advisors or attorneys.

You have the right to end the meeting at any time.

You have the right to contact the Department of Insurance for information or to file a complaint. The Consumer Assistance telephone numbers are 800-927-HELP (4357).

The following individuals will be coming to your home with me (list all attendees and insurance license information, if applicable): _____

Signature of Agent/Broker: _____ Date: _____

Print Name of Agent/Broker: _____

Name of Applicant/Prospective Owner/Insured: _____

Applicant/Prospective Owner/Insured Date of Birth: _____