



CONTRACT INFORMATION SHEET

Agent Name: _____
(As on license) First Name Middle Initial Last Name

(If corporate contract, give corporate name and your title)

BGA Name: _____ BGA Agent #: _____

Branch Code: _____ Agent Contract Level: _____ Next Level Agent #: _____

Requirements for contract and appointment:

- | | |
|--------------------------|--|
| <input type="checkbox"/> | 1) Contract Information Sheet |
| <input type="checkbox"/> | 2) Background Questionnaire |
| <input type="checkbox"/> | 3) Signed W7964 signature page |
| <input type="checkbox"/> | 4) Errors & Omissions (copy of policy's face page) |
| <input type="checkbox"/> | 5) Current licenses |
| <input type="checkbox"/> | 6) Commission Direct Deposit (authorization/voided check) |
| <input type="checkbox"/> | 7) W9 Tax ID form |
| <input type="checkbox"/> | 8) Solicitor Agreement or Assignment of Commissions – If applicable |

Home Office Use Only

Investigative Reports: Equifax _____ B.I.G. _____

West Coast Life Agent Numbers: _____

Contract Effective Date: _____

Agent Code: _____ Contract mailed on: _____

LIFECOMM: _____ Appt processed/Confirmed: State - _____ Date - _____

State - _____ Date - _____