



GREAT LAKES
INSURANCE &
FINANCIAL SERVICES
AGENCY

Call for a Personal Consultation Ph. 888-883-5290 or 616-656-5555

Send Us Your Information Securely via Fax 888-715-1289 or

Email to Kinzie@GLIBrokers.com

Agent: Jeanine Kinzie, National Producer Number (NPN) 8049289

Federally Facilitated Marketplace (FFM) #JKINZIE49316@616

Information Needed for Health Insurance Consultation

1. Please provide for each person in your home
 - a. Name
 - b. Social Security Number
 - c. Date of Birth
 - d. Does anyone use tobacco more than 4 times a week?
 - e. Do you file taxes together? (1040 is most helpful)

2. Business name where any of your family members work
 - a. Amount of money they are paid (paycheck stub if you have one)
 - b. How often they get paid
 - c. Is health insurance offered thru this job?
 - i. If yes, are they enrolled in this coverage? (the insurance card if you can)
 - ii. How much will this cost each month?
 - iii. Who will this cover?

3. Any other income each month for you and/or anyone in your family?
 - a. Amount of money received? (bring any papers you have on this)
 - b. How often paid?
 - c. Who pays this to you?

4. Does anyone have health insurance from anywhere else? (bring the insurance card)
 - a. If yes, will this coverage continue?
 - b. How much will this cost each month?
 - c. Who will this cover?
 - d. Who is this insurance with?

Person 1

Full Name	
Social Security Number	
Date of Birth & Gender	
Tobacco Use	
Income Before Taxes	
How Often Received	
Where is Income From	

Person 2

Full Name	
Social Security Number	
Date of Birth & Gender	
Tobacco Use	
Income Before Taxes	
How Often Received	
Where is Income From	

Person 3

Full Name	
Social Security Number	
Date of Birth & Gender	
Tobacco Use	
Income Before Taxes	
How Often Received	
Where is Income From	

Person 4

Full Name	
Social Security Number	
Date of Birth & Gender	
Tobacco Use	
Income Before Taxes	
How Often Received	
Where is Income From	

Person 5

Full Name	
Social Security Number	
Date of Birth & Gender	
Tobacco Use	
Income Before Taxes	
How Often Received	
Where is Income From	