

# National Benefits Group, Inc.

1410 Triad Center  
St. Peters, MO 63376

Office: (636) 922-4617  
Fax: (413) 702-6249  
Toll free (888) 873-4918

Name of business \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Bus Phone \_\_\_\_\_ Hm phone \_\_\_\_\_

Contact name \_\_\_\_\_ Fax \_\_\_\_\_

Age \_\_\_\_\_ Smoker? \_\_\_\_\_ Spouse age \_\_\_\_\_ Smoker? \_\_\_\_\_

No. of children \_\_\_\_\_ Occupation \_\_\_\_\_

Spouse on same plan? \_\_\_\_\_ Current carrier \_\_\_\_\_

How long? \_\_\_\_\_

Do you like current plan? \_\_\_\_\_

A. Like most \_\_\_\_\_

B. Like least \_\_\_\_\_

C. Would like to change \_\_\_\_\_

Does employer currently pay part of premium? \_\_\_\_\_

Any claims problems? \_\_\_\_\_ Rate increases? \_\_\_\_\_

Deductable \_\_\_\_\_ Premium \_\_\_\_\_

Health problems? \_\_\_\_\_

Would you like a free quote and comparison? Yes \_\_\_\_\_ No \_\_\_\_\_

Best time to call? \_\_\_\_\_

Evenings \_\_\_\_\_ Mornings \_\_\_\_\_ Afternoons \_\_\_\_\_

Notes \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_