



Cover Letter for Allianz

Client Name _____

Producer Name _____

This application is being submitted as part of the Kai-Zen Program and there should be a 30% agent split with Grace Barnard, NIW Companies, Inc. (Agent code 673000101)

The Kai-Zen Program with Allianz has the following guidelines and client should be pre-screened prior to submitting:

Income \$100-199K – Must have Net Worth of at least \$1 million

Income \$200 - \$399K – Must have Net Worth of at least \$500K

Income of \$400K or more – No Net Worth Requirement

For Kai-Zen Cases – Agent will need to be licensed in NEVADA PRIOR to submitting the application

Forms to be submitted to lifeinsurance@send.allianzlife.com and COPIED TO info@kaizenplan.com

Cover letter

Long Form Application

HIPAA

Personal Financial Stmt

Kai-Zen Prem Finance Disc

Agent Addendum for Prem Fin

Producers Report

Allianz will ORDER the Paramed Exam for the agent – due to long form – it has to be done a specific way.

If you ordered one for another carrier and want to submit – insured will need to complete ALL the medical questions on the Long Form application