



Protection for Your Piece of Mind

Congratulations on your mortgage financing! We are truly very happy to have helped you obtain the financing for your home. The next step is protecting your family and estate in case of any unforeseen issues. We offer an insurance analysis to custom tailor your insurance needs to help you protect your family for the future.

As part of our customer service to you, we would like to introduce you to our insurance team, Kapur Financial Group Inc. and have them assess your needs and present you with solutions. Our Insurance Advisors are here to assist you through the process of choosing the correct coverage for you.

Tribe Financial and Kapur Financial Group are not the providers of the insurance coverage being considered. Coverage is subject to health underwriting and the insurance carrier will determine whether they will agree to provide you with coverage. The insurance carrier reserves the right to request any information, documentation, or medicals that they deem necessary during the underwriting process.

We appreciate your confidence in us and are happy to provide you with this valued service. One of our Insurance Advisors will be contacting you to discuss this further.

Name #1 - Please Print

Signature #1

Preferred Phone Number

Mortgage Agent

Name #2 - Please Print

Signature #2

Preferred Email

Date



By signing below, I acknowledge that I have been given the opportunity to purchase Life, Critical Illness, and disability insurance along with Wealth Creation Products in order to protect my mortgage and/or investments. I have been advised and understand the importance of insuring against premature death, disability or serious illness. I have been offered the option to speak with a licensed advisor about these matters and I am declining the insurance coverage offered at this time.

I/We are waiving the option for insurance analysis/coverage.

Signature #1

Date

Signature #2

Date

Reason for Waiving?

- Already have coverage
- Not required at this time
- Investigating other options
- Other _____

