

# New Broker Sign Up Worksheet

- First Name \_\_\_\_\_ MI \_\_\_\_\_ Last Name \_\_\_\_\_
- Street Address \_\_\_\_\_ Apt. # \_\_\_\_\_
- City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_
- Home Phone \_\_\_\_\_
- Date of Birth \_\_\_\_\_
- Spouse name (only if they want them in business with them too)  
Spouse First Name \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_
- Best email address \_\_\_\_\_
- List names of people in house they want covered on the card

Name \_\_\_\_\_ Sex M/F Date of Birth \_\_\_/\_\_\_/\_\_\_ Relationship \_\_\_\_\_

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- Which enrollment type - \$35 or \$235 (circle one)
- When do they want billed for monthly charge – 3<sup>rd</sup> or 18<sup>th</sup> (circle one)
- Do they want the websites? \_\_\_\_\_
- Credit Card (circle one) Visa - MC - Discover - AMEX - Bank Draft
- Credit Card Number \_\_\_\_\_
- Expiration Date \_\_\_\_\_
- Name as it appear on Credit Card: \_\_\_\_\_
- Routing# \_\_\_\_\_ (9digits) Acct# \_\_\_\_\_
- Password they would like to use \_\_\_\_\_
- Social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ (for tax purposes, AmeriPlan needs it to report their earnings to the IRS)