



Annual Open Enrollment Periods are Oct 15th – Dec 15th - Jan 15th

In order to provide FREE Assistance as a Certified Insurance Agent, Please Complete & Sign.

Documents Needed: 1. Proof of current Income (Tax Filings or Check Stub) 2. CA ID or Driver's License of Primary Insured. 3., **Proof of Lawful Presence**, like Legal Resident Card, Certificate or U.S passport

PLEASE BRING IN or FAX FORM TO 831-855-1515 To be HIPPA Compliant.

Name (Primary person filing taxes) _____ # in Family _____

Address: _____, _____ CA. _____ Filing Status _____

Home/Cell phone: _____ Email: _____

D.O.B: _____ Soc Sec #: _____ Est Annual Income: \$ _____

Employer Name & Address: _____

Spouse Name: _____

D.O.B: _____ Soc Sec. # _____ Est. Annual Income: \$ _____

Employer Name & Address: _____

Dependents: (Circle Gender)

Name: _____ (M/F) D.O.B: _____ Soc Sec #: _____

Name: _____ (M/F) D.O.B: _____ Soc Sec #: _____

Name: _____ (M/F) D.O.B: _____ Soc Sec #: _____

Name: _____ (M/F) D.O.B: _____ Soc Sec #: _____

Signature: _____ Date: _____

NOTES: _____

Office Use Only

App #: _____ Case #: _____ Access Code: _____

Plan selected: _____ Premiums: _____ Initial: _____ Reg Voter _____

Need Dental: _____ Vision: _____ Documents to upload: _____

Jay B. Cohen CA Licensed & CC Certified Insurance Agent - (831) 521-1089 * CA Lic # 0C83812

Walk-ins Welcome - 222 Main St, Oldtown Salinas, CA 93901- Fax 831-855-1515

Website: www.EveryonesCovered.com E-mail your ID to: info@EveryonesCovered.com



**Thank you for allowing us the opportunity to work with you and your family.
Everyone's needs are different, let us help you cover what concerns you most!**

Please tell us how did you found us? _____

DENTAL through Covered CA or independently. **Int:** _____

Have Need More Info

- HMO Plans** are less expensive (\$9-\$20/mo.) and network providers are smaller.
- PPO Plans** are more expensive (\$41-\$65/mo.) and you can go to any Dentist.

VISION **Int:** _____

Have Need More Info

- VSP Plan** (\$16.34 /mo.) Available at most all Optometrists .
- EyeMed Plan** (10.67/mo.) In most Big Box Stores (Sears, Wal-Mart, Lens Crafters)

LEGAL SHIELD & ID SHIELD **Int:** _____

You Deserve Affordable Legal & Identity Theft Protection. As unexpected legal questions & identity theft issues arise, enjoy access to qualified law firms and attorneys as well as professionals skilled in identity theft monitoring and restoration. With LegalShield, You'll have that Power.

Have Need More Info

- Legal Shield**
- ID Shield**

LIFE INSURANCE & ASSET PROTECTION FOR FAMILY **Int:** _____

Have Need More Info

- Term** - Inexpensive income replacement plan for a time period - Now with Living Benefits.
- Mortgage Protection** Plans
- Index Universal Life Plans** - Retirement, tax free cash value growth, permanently in place
- Final Expense** Plans - Over 50, 24/7 concierge services, no health exam, guaranteed.
- Tax-Free Children's savings plan** - Start as low as \$45 a month.
- Tax-Sheltered money** needed to be reviewed or rolled over. - 401k or other similar plans
- Business Owner/Self-Employed** - Self-Owned Tax-Advantaged Retirement plan
- Self-funded Retirement options for employees**- Offered by Employer but not paid by
- Retirement options for Individuals**- via **Indexed or Regular Annuities**.

Other Concerns or wanted info? _____

Jay Cohen Insurance Services is dedicated to offering complimentary reviews, upgrades and quotes during open enrollment. Who do you know could benefit from our information and our free services?

Name:	Phone:	Relationship

Jay Cohen Insurance Services. Please Fax Form to 831-855-1515 or bring to office for appointment.

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