



Individual Health Benefits Information Form

Date: _____

Personal Information

Name _____

Phone _____ Email _____

Address _____

City _____ State _____ Zip Code _____

Social Security # _____ DOB _____ Gender _____

Income

Household income AGI (Adjusted Growth Income, income after deductions) \$ _____

| Company Name | Income (yearly) | Who works there (you or spouse) |
|--------------|-----------------|---------------------------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Family Members

Spouse

| Name | Birthdate | Social Security Number (Identification Number) | Gender |
|-------|-----------|--|--------|
| _____ | _____ | _____ | _____ |

Children

| Name | Birthdate | Social Security Number (Identification Number) | Gender |
|-------|-----------|--|--------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Check Benefits you are interested in:

- Health Insurance
- Dental
- Vision
- Maternity Insurance
- Disability Insurance
- Life Insurance
- MD Live (Audio/Video calls for doctors and prescriptions)
- HSA Account
- Pre-Paid Legal product
- 401K
- Retirement Planning
- Wills and Estate setup

Link to enroll in a Health care exchange plan

https://www.healthsherpa.com/?_agent_id=JTLinsuranceservices

Completing this form does not obligate, enroll, or bind any coverage.