SDMI
Insurance and Financial Services

Business:	
Address:	
Phone #:	
Email:	

Advisor: Steve Moeller Phone: 510-284-2125
Fax: 510-794-4769
Email: steve@sdmifinancial.com

Required Fields in Orange Lettering

First Name	Last Name	Date of Birth	Age	Medical Status (EE=Employee SP=Spouse CH=Child)	Dental Status (EE=Employee SP=Spouse CH=Child)	Vision Status (EE=Employee SP=Spouse CH=Child)	Zip	SS	Email
Sam	Sample	9/9/1916	99	EE	EE	EE	94536	$100,000	
Beth	Sample	9/9/1916	99	SP	ES	ES	94536	NA	
Zach	Sample	1/1/1998	18	CH	CH	CH	94536	NA	

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