CAMBRIDGE
WEALTH MANAGEMENT
accounting | legal | financial

HIPAA Compliant Authorization for Release of Health -Related Information to Legacy Financial Partners

For the purpose of obtaining the insurance coverage that I have requested, I hereby authorize Legacy Financial Partners, their staff and employees, to disclose my personal financial and health information to the insurance companies listed below.

I authorize any health plan, physician, health care professional, hospital, clinic, laboratory, pharmacy, medical facility, Pharmacy Benefit Manager or other health care provider that has provided treatment or service to me on my behalf within the past 10 years to disclose my entire medical record and any other information that may be considered protected health information under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") concerning me to my Representative affiliated companies and/or entities, insurance companies and their re-insurers. This includes information on the diagnosis or treatment of Human Immunodeficiency Virus (HIV) Infection and sexually transmitted diseases. This also includes information on the diagnosis and treatment of mental illness and the use of alcohol, drugs, and tobacco.

By my signature below, I acknowledge that any agreements I have made with my Providers that restrict disclosure of my medical records and any associated HIPAA protected health information do not apply for purposes of this authorization and I instruct my Providers to release and disclose my entire medical record without restrictions to my Representative. I understand that any information that is disclosed pursuant to this authorization may be re-disclosed and no longer covered by certain federal rules governing privacy and confidentiality of health information.

The information contained in these medical and financial records will be held in confidence and may be used only for the purpose of the procurement, or the evaluation or understanding for the possible procurement of life, health, long term care, or other insurance products. The contents therein may be reviewed and assessed by a qualified staff consisting of medical directors, underwriters, underwriting assistants, or other related employees involved in the submission, receipt or evaluation of insurance applications or prospective application of the insurance companies listed below, their re-insurers, the Medical Information Bureau (MIB) as well as my Representative.

This authorization shall be valid for twelve (12) months from the date below. A copy of this authorization shall be as valid as the original. I understand that I am entitled to receive a copy of this authorization.

I understand that I may write to my Representative to revoke this authorization and that the revocation will take effect when my Representative receives my written request. I understand that any action already taken in reliance on this authorization cannot be reversed, and my revocation will not affect those actions. I also understand that my revocation will not affect the right of the insurance companies listed below to contest a claim under insurance policy or to contest the policy itself. I understand that the medical provider to whom this authorization is furnished may not condition its treatment of me on whether or not I sign the authorization.

I understand that if I refuse to sign this authorization, my representative may not be able to provide full and complete information about the insurance coverage and it cost that may be available to me. I also understand and acknowledge that each of the insurers listed on this form or to which I may formally apply, may require me to sign a similar authorization used exclusively by such insurer before they will process my application or offer insurance coverage. I understand that my Providers may not refuse to provide treatment or payment for health care services if I refuse to sign this authorization.

AIG, Allianz Life Insurance Company of North America, American General Life Insurance Company, American National, AVIVA, AXA Equitable, Banner Life Insurance Company, Genworth Financial Family of Companies, ING USA Annuity and Life Insurance Company, John Hancock, Lincoln Benefit Life, Lincoln National Life, Mass Mutual Life, Metropolitan Life Insurance Company and MetLife Investors USA Insurance Company and their affiliates, Mutual of Omaha Insurance Companies, Mutual Trust Life, Nationwide, New York Life, North American, Principal, Protective, Prudential Insurance Company of America, Pruco Life Insurance Company, Pruco Life Insurance Company of New Jersey, ReliaStar Life Insurance Company, ReliStar Life Insurance Company of New York, SBLI, Security Life of Denver Insurance Company, Sun Life of Canada, Transamerica, United of Omaha Life Insurance Company, William Penn Life Insurance Company of New York, West Coast Life.

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Signature of Proposed Insured/Patient or Personal Representative Date: (month/day/year)

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Description of Personal Representative's Authority or Relationship to Patient