

SPEED UP THE UNDERWRITING PROCESS AND GET PAID FASTER!

LIFE NEW BUSINESS PROCESSING CHECKLIST

Refer to ***Life Quick Start Card*** for more details

<p>☒ Get appointed with the carrier. Go to www.amsforlife.com, click on "Get Contracted" and notify AMS Licensing Department to start your licensing process.</p>
<p>☒ Obtain appropriate illustrations. Go to www.amsforlife.com and click on "Request Illustration"</p>
<p>☒ Download application and related forms. Option 1: Get customized pre-sale consultation by calling 866-546-5267, option 2 (Case Management). Option 2: Obtain forms from "Get Forms" tab on home page of website www.amsforlife.com</p>
<p>☒ Complete the carrier application paperwork. * Make sure that:</p> <ul style="list-style-type: none">○ All questions on the application are fully answered and all "yes" answers include full details. Be sure that any required questionnaires are also completed.○ Complete doctor information is listed on the insured(s) including addresses and phone numbers to avoid delays in ordering.○ Agent's Report on the life application is fully completed.○ All state specific forms are attached (i.e. HIV Consent Form, HIPAA, Replacement and/or 1035 forms if applicable, etc.).
<p>☒ Write a cover letter (optional for term cases or cases less than \$500,000 face – highly recommended for policies of \$1,000,000 or more) explaining the client's situation.</p>
<p>☒ Complete the <i>AMS for Life</i> New Business Transmittal.</p>
<p>☒ Make sure the client understands what to expect during the underwriting process (e.g. what medical requirements will they be expected to complete, will they have a telephone inspection from the Carrier, will a Motor Vehicle Report be obtained, etc.). Also, let the client know that <u>if possible</u> it's best to avoid going to the doctor during the underwriting process since the underwriter may require additional doctor records.</p>
<p>☒ Mail or fax transmittal, cover letter, carrier application paperwork and illustration (if required) to: <i>AMS FOR LIFE – 15050 AVENUE OF SCIENCE, STE. 100, SAN DIEGO, CA 92128</i> OR FAX TO: 858-207-1793 (Note: Originals must be mailed to <i>AMS For Life</i> if premium has been collected with the application or if there is a 1035 involved. We also recommend using a mail service with tracking.)</p>
<p>☒ Check your case status in two ways:</p> <p>Option 1: Call your case manager at 866-546-5267 – Option 2</p> <p>Option 2: Log on to www.amsforlife.com and click on "Case Status".</p>

* **AMS FOR LIFE** OFFERS **IGO** ELECTRONIC APPLICATIONS THROUGH I-PIPELINE. WATCH THE VIDEO "**PROCESSING YOUR ELECTRONIC APPLICATION**" ON OUR WEBSITE, WWW.AMSFORLIFE.COM, FOR COMPLETE INSTRUCTIONS ON PROCESSING BOTH YOUR ELECTRONIC AND PAPER APPLICATIONS.