

IT'S THE EASY, FAST & SMART WAY TO SUBMIT BUSINESS!

- **Flexible features**
 - Tablet-friendly
 - Simple navigation
 - Save cases in progress
 - View submitted applications
- **Intelligent data entry** - highlights required fields based on application answers
- **Reduce NIGOs** - Error indicators ensure forms are fully completed
- **State-specific forms** - automatically generate the applicable forms for state of issue
- **Electronic Signature** - clients sign either at the point of sale or via email!

Now on
PhoenixSalesNet.com
for:
Remembrance Life

Click **OPEN** to see a complete list of forms and navigate to incomplete pages (shown in red).

PROGRESS INDICATOR
Click here to see a list of incomplete fields. Click the field to navigate there.

ERROR BUBBLE
Click to highlight remaining required fields

LifeSuite Environment for Submission Testing
Agent Demo Page
Life New Business Cover Sheet *
▲ Remembrance Life - Application Part I *
Page 1 *
Page 2 *
Page 3 *
Page 4 *
Page 5 *
▼ Remembrance Life - Application Part II *
▼ HIPAA Form *
▼ Electronic Signature Consent Form *
▼ Electronic Signature Consent Form *

Use red arrows to easily go from page to page

Questions?
For Technical Support, call 800-541-0171; option 1, option 1
For Product Information, call 888-798-4447

For agent use only. Not for distribution to the public as sales literature.

GOOD TO KNOW!

Allow ample time to review and confirm data in the documents. Both the Agent and Insured must acknowledge and confirm data prior to signing documents.

USE ELECTRONIC SIGNATURE FOR TRUE BUSINESS FLEXIBILITY AND SPEED!

E-SIGNATURE OPTIONS

Sign Now Touch-screen with a stylus/ finger (tablet) or mouse (computer)

1 FORM ENTRY ✓ 2 SIGNATURES 3 FINALIZE

Agent On-Site Signature

Agent Full Name: Joe Advisor Agent ID: 81245
City: Miami State: Florida
Today's Date: 3/25/2015

Sign on this pad to override the text script

Joe Advisor

I Consent I Decline Cancel Clear Signature

Email a request for signature (for Insureds only)

1 FORM ENTRY ✓ 2 SIGNATURES 3 FINALIZE

Send Email to Client To Request Signatures

Your client will receive an email message with instructions to complete the electronic application process.

Client Name: John Smith Subject: Mr. Smith - Remembrance Life - Please complete your sign
Client Email: johnsmith@email.com
Your Name: XIGTW02, XIGTW02
Your Email: joeadvisor@email.com
* Client Last 4 Digits of SSN: 3333
* Client Birth Date: 01/01/1960

Dear John Smith:
Thank you for applying for 'Remembrance Life' of Phoenix. Use the link included at the bottom of the email to start the signing process. You will be asked to acknowledge your acceptance of the disclosure terms and contents. The instructions for completing your 'Electronic Signature' will be provided as well.

Please use your birth date and the last 4 digits of your SSN to

Send Email Request Cancel

MANAGING SIGNATURE REQUESTS Within the application, a gold envelope in the upper right corner will indicate a pending e-Signature. Click the envelope to view pending requests and send reminders.

PHOENIX Back to Application

1 FORM ENTRY ✓ 2 SIGNATURES 3 FINALIZE

Federal Regulations and List of Required Signers

Pending Request

Request Type: Electronic Signature Insured [Send Reminder to John Smith](#)
Recipient: John Smith; [Send Passcode to John Smith's Cell Phone](#)
Email Sent: marilyncain@gmail.com [Cancel this request](#)
Date: 3/25/2015 8:14:02 PM

[Close]

GOOD TO KNOW!

For the Sign Now option, Agent will need to verify the following Insured information

- Valid ID Information
- Full Name
- Last 4 numbers of the Social Security Number
- Birth Date
- Email Address*

*If an email is not provided, give your client printouts of the proper disclosures.

APPLICATION SUBMISSION Once Electronic Signatures are complete, the application can be submitted, and you will receive confirmation and a Case Number.

Week Month Quarter YTD All Search Advanced

Owner XIGTW02, XIGTW02 : 5 cases updated in the last 30 days. Status: Any Sort: Date

Mr. Smith - Remembrance Life (Pending Requests!) Remembrance Life Signatures

Last Action: E-Signature Request Sent To Client Last Audit Entry: 3/25/2015 2:26:10 PM MST 'XIGTW02, XIGTW02' sent email to request e-Signature from 'John Smith'. Email was sent to johnsmith@email.com. Application is currently locked pending e-Signature. View History Requests Delete Copy

New Application - Safe Harbor Term (High/Low) Safe Harbor Term (High/Low) Complete

Last Action: Back Office Message Last Audit Entry: 3/19/2015 8:39:39 AM MST Submitted successfully View History Requests Delete Copy

Once Electronic Signatures are complete, the application can be submitted, and you will receive confirmation and a Case Number. All applications are available for view/print under All Applications on the eApp dashboard. If an email address was provided, the Insured will also receive a link to the final documents. Application documents may be viewed or downloaded for 60 days after submission.

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