

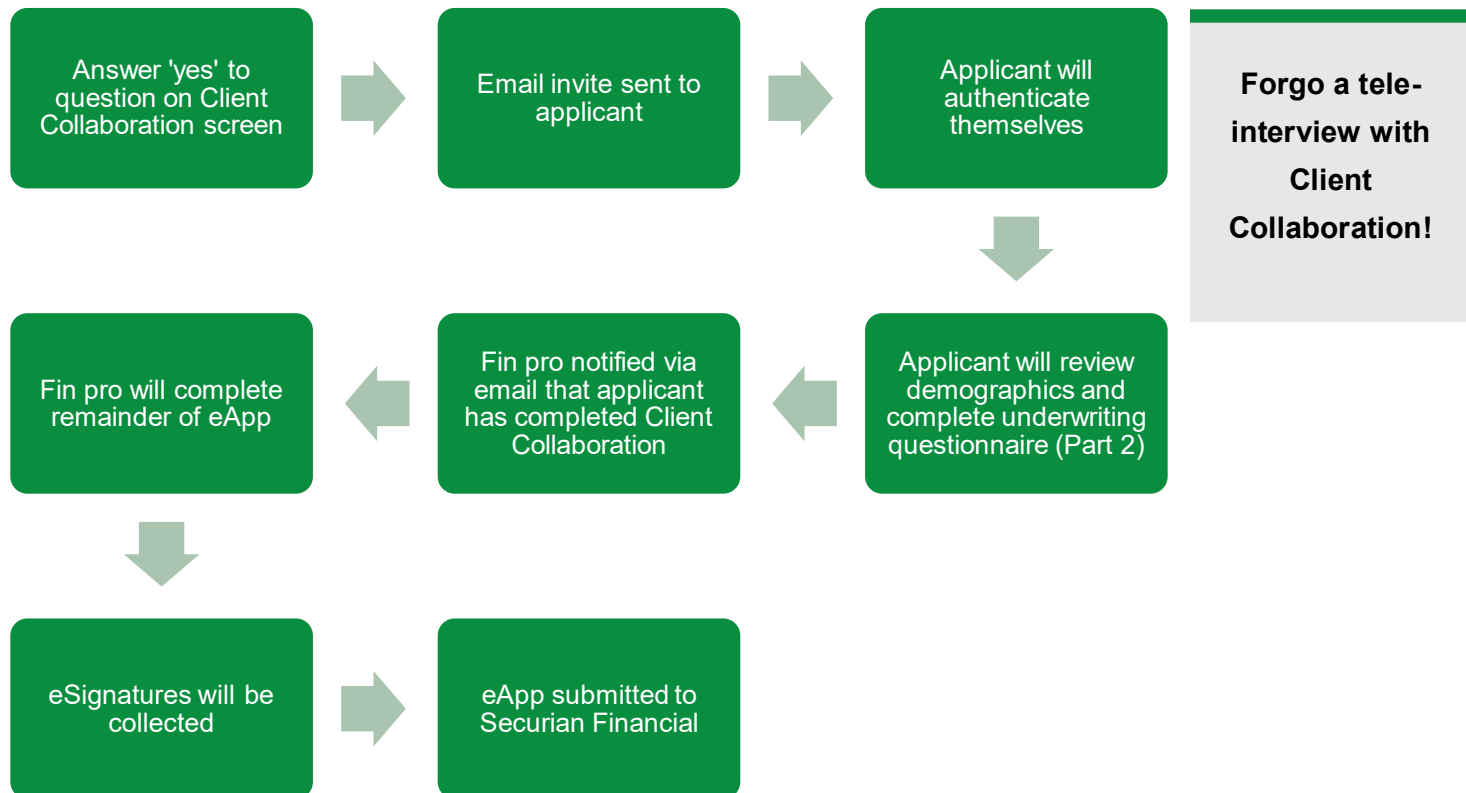
Client Collaboration

How it works



Client Collaboration allows the applicant to complete parts of the eApp. This includes the underwriting questionnaire (part 2).¹

How does Client Collaboration work?



FREQUENTLY ASKED QUESTIONS

When can I NOT use Client Collaboration?

- Applications taken in NY or for NY products
- SecureCare Universal Life
- Drop Ticket
- If proposed insured and owner are different

What does the applicant need to complete the authentication process? They will need to have a valid email address and a cell phone to complete the authentication process.

Is the underwriting questionnaire required if I select Client Collaboration? Yes, the applicant will be required to complete the entirety of the underwriting questionnaire (part 2)

If Client Collaboration is completed, will the applicant still need to do a tele-interview?

No!

If the applicant doesn't want to participate in Client Collaboration, can the fin pro complete the underwriting questionnaire during eApp?

Yes! Select, 'no' to the question on the Client Collaboration screen. Then answer, 'yes' to the question 'would you like to complete the medical history questions at this time?' on the 'Medical History' screen.

How long is the email link valid for?

14 calendar days. It can be resent from the 'case details' screen should the link expire.

Have more questions? Contact us at 833-365-0329.

1.For eligible clients.

Please keep in mind that the primary reason to purchase a life insurance product is the death benefit.

Life insurance products contain fees, such as mortality and expense charges (which may increase over time), and may contain restrictions, such as surrender periods.

SecureCare may not be available in all states. Product features, including limitations and exclusions, may vary by state.

SecureCare Universal Life Insurance includes the Acceleration for Long-Term Care Agreement. The Acceleration for Long-Term Care Agreement is a tax qualified long-term care agreement that covers care such as nursing care, home and community-based care, and informal care as defined in this agreement. This agreement provides for the payment of a monthly benefit for qualified long-term care services. This agreement is intended to provide federally tax qualified long-term care insurance benefits under Section 7702B of the Internal Revenue Code, as amended. However, due to uncertainty in the tax law, benefits paid under this agreement may be taxable.

Additional agreements may be available. Agreements may be subject to additional costs and restrictions. Agreements may not be available in all states or may exist under a different name in various states and may not be available in combination with other agreements.

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