

Telesales Carrier Guide



Approved Carriers

Carrier	Approved Products	Method	Agent Requirements	Training Resources
AIG shareservicesproducercare@aig.com 1-800-247-8837	<ul style="list-style-type: none"> · Select-A-Term · Secure Lifetime GUL 3 · Max Accumulator + IUL · Value+ Protector IUL 	Communicate with client over the phone, while filling out AIG's e-application, called "AG Quick Ticket." After information is submitted online by agent, the customer will be contacted by AIG to complete the application before an underwriting decision is made.	<ul style="list-style-type: none"> · Must be contracted with AIG to access AG Quick Ticket on AIG's portal. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · AIG Quick Ticket Quick Reference Guide · AIG Quick Ticket User Functionality Guide · Client Guide – Preparing for Telephone Interview
	GIWL	Communicate with client over the phone, while filling out AIG's GIWL e-application . After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with AIG to sell GIWL product and access GIWL e-application. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · AIG GIWL eSignature DocuSign Process Training
American Amicable marketingassistants@aatax.com 1-800-736-7311	<ul style="list-style-type: none"> · Express Term · Home Certainty WL 	Communicate with client over the phone, while filling out American Amicable's e-application . After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with American Amicable to access e-application on American Amicable's portal. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · Producer Guide to Phone Sales
	Dignity Solutions WL	Communicate with client over the phone, while filling out American Amicable's e-application . After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process and a phone call from American Amicable to complete a PHI before an underwriting decision is made.	<ul style="list-style-type: none"> · Must be contracted with American Amicable to access e-application on American Amicable's portal. · Must be licensed in state that client resides. 	
American Equity New_business@american-equity.com 1-515-221-0002	All Annuities	Communicate with client over the phone, while filling out American Equity's e-application, called " ReadyApp ." After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with American Equity to access ReadyApp on American Equity's portal. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · Requirements for Non-Face-to-Face Sales · ReadyApp Tutorial
Americo sales.support@americo.com 1-800-231-0801	<ul style="list-style-type: none"> · HMS Plus Payment Protector Term · HMS Plus ADP w/ROP Term · HMS Plus 100 Term · HMS Plus 125 Term · HMS Plus 150 Term · Eagle Premier WL · HMS Plus Continuation WL · Payment Protector Continuation WL 	Communicate with client over the phone, while filling out Americo's e-application . After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Americo to access e-application on Americo's portal. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · E-Application Quick Reference Guide
	Eagle Premier WL	Conduct a three-way call with the client and Americo's Eagle Premier Series Telesales call center (1-855-248-8327). Americo representative will collect voice signature at end of application process.	<ul style="list-style-type: none"> · Must be contracted with Americo. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · Eagle Premier TeleApp Worksheet
Columbus Life clsalesdesk@columbuslife.com 1-800-677-9696	<ul style="list-style-type: none"> · Nautical Term · Voyager UL · Explorer Plus UL · Indexed Explorer Plus IUL 	Communicate with client over the phone, while filling out Columbus Life's e-application through iPipeline. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Columbus Life to access e-application on iPipeline. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · User Guide to iGo
Fidelity & Guaranty 1-800-445-6758	All Annuities and IUL	Communicate with client over video platform, while filling out F&G's e-application on F&G's portal . After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with F&G to access e-application on F&G's portal. · Must use video platform (FaceTime, Skype, Zoom, Google Duo, etc.). · Must be licensed and live in the same state that the client resides. 	<ul style="list-style-type: none"> · Video Sales Guidelines · E-App Training Video can be located in F&G agent portal homepage under "Sales Tools & Resources"
	Foresters nbnewbiz@foresters.com 1-866-466-7166	<ul style="list-style-type: none"> · Strong Foundation Term · Your Term · Smart UL · Advantage Plus II WL 	Communicate with client over the phone, while filling out Foresters' e-application through iPipeline. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Foresters to access e-application on iPipeline. · Must be licensed in state that client resides.
	PlanRight WL	Communicate with client over the phone, while filling out Foresters' paper application for PlanRight. On the Producer Certification section, answer NO to the following question: "Did you personally meet with the proposed insured and owner to review the document(s) used to verify identify and birth date of each person?" Once complete, mail application to the client to sign. The client will send the application back to you by mail, as Foresters does not accept scans or photographs of applications. You will then mail the completed application to Foresters.	<ul style="list-style-type: none"> · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · Non-Face-to-Face Guidelines
Gerber gerberlifeagentsales@gerberlife.com 1-800-428-4947	<ul style="list-style-type: none"> · AD&D · All WL 	Communicate with client over the phone, while filling out Gerber's e-application on Gerber's portal . After information is submitted online by agent, and the "save and e-mail" option is selected, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Gerber to access e-application on Gerber's portal. · Must be licensed in state that client resides. 	Training documents found on Gerber's portal .
John Hancock 1-866-595-7361	Simple Term with Vitality	Communicate with client over the phone (or video platform) while filling out the Simple Term e-application on the Simple Term Microsite. Choose "phone-based sale" on page one, under the agent data section. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with John Hancock to access e-application on Simple Term Microsite. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · E-App Walkthrough Video · E-App Flyer · Enhanced E-Signature Process
Lafayette Life icenter@lilic.com 1-877-267-4409	All WL	Communicate with client over the phone, while filling out Lafayette Life's e-application through iPipeline. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Lafayette Life to access e-application through iPipeline. · Must be licensed in state that the client resides. 	<ul style="list-style-type: none"> · Guide to iGo eapp · iGo FAQ
Mutual of Omaha 1-800-693-6083	<ul style="list-style-type: none"> · Guaranteed Advantage · Term Life Answers · Term Life Express · Children's WL · Living Promise 	Communicate with client over the phone, while filling out Mutual of Omaha's e-application through iPipeline. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Mutual of Omaha to access e-application through iPipeline. · Must be licensed in state that the client resides. 	<ul style="list-style-type: none"> · E-App User Guide · Producer Guidelines
	Priority Income Protection DI	Communicate with client over the phone, while filling out Mutual of Omaha's DI e-application through Mutual of Omaha's portal. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Mutual of Omaha to access e-application through Mutual of Omaha's portal. · Must be licensed in state that the client resides. 	<ul style="list-style-type: none"> · Quick Start Guide · Training Video
	All CI	Communicate with client over the phone, while filling out Mutual of Omaha's CI e-application through Mutual of Omaha's portal. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Mutual of Omaha to access e-application through Mutual of Omaha's portal. · Must be licensed in state that the client resides. 	<ul style="list-style-type: none"> · FAQ
Mutual Trust Life salesdevelopment@mutualtrust.com 1-800-323-7320	All WL	Communicate with client over video platform, while filling out application through Adobe. Use Adobe or DocuSign to send e-mail to client to collect e-signature and note which method was used in Agent Report before submitting application to carrier through OPT	<ul style="list-style-type: none"> · Must be contracted with Mutual Trust Life. · Must use video platform (FaceTime, Skype, Zoom, Google Duo, etc.). · Must have personal access to Adobe Sign capabilities or DocuSign. · Must be licensed in state that the client resides. 	<ul style="list-style-type: none"> · No Need Pin Bulletin · Sending Docs Electronically Guide · Message and Document Upload Center Training Video
National Life Group agentservices@nationallife.com 1-800-906-3310	<ul style="list-style-type: none"> · All Term · TotalSecure WL · All Annuities · All IUL 	Communicate with client over video platform, while filling out NLG's e-application through iPipeline. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with NLG to access e-application through iPipeline. · Must use video platform (FaceTime, Skype, Zoom, Google Duo, etc.). · Must be licensed in the same state that the client resides. 	<ul style="list-style-type: none"> · Accepting Remote Applications · eApp: Start New Case Training · eApp: eSignature Training · Annuity e-APP Rules of the Road
	<ul style="list-style-type: none"> · All Term · Custom Guarantee IUL · Builder Plus IUL · Protection Builder IUL · Smart Builder IUL 	Communicate with client over the phone, while filling out North American Company's e-application through iPipeline. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with North American Company to access e-application through iPipeline. · Must be licensed in the same state that the client resides. 	<ul style="list-style-type: none"> · SimpleSubmit Agent Guide · SimpleSubmit Demo
	All Annuities	Communicate with client over the phone, while filling out North American Company's annuity e-application through North American Company's portal. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with North American Company to access e-application through North American Company's portal. · Must be licensed in the same state that the client resides. 	<ul style="list-style-type: none"> · Annuity E-App: Step by Step Guide · E-App FAQ
Phoenix Life 1-888-794-4447	<ul style="list-style-type: none"> · Safe Remembrance Term · Remembrance Life WL 	Communicate with client over the phone, while filling out Phoenix Life's e-application . After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Phoenix Life to access e-application through Phoenix Life's portal. · Must be licensed in the same state that the client resides. 	<ul style="list-style-type: none"> · Client Signature User Guide · E-App User Guide
Transamerica Life.MarketsNewBusiness@transamerica.com 1-866-303-7833	All Term	Communicate with client over the phone, while filling out Transamerica's e-application through iPipeline. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with Transamerica to access e-application through iPipeline. · Must be licensed in the same state that the client resides. 	<ul style="list-style-type: none"> · iGo E-App Training
UHL Uhl.newbusiness@unitedhomelife.com 1-800-428-3001	<ul style="list-style-type: none"> · Simple Term · Final Expense WL 	Communicate with client over the phone, while filling out UHL's e-application through iPipeline. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	<ul style="list-style-type: none"> · Must be contracted with UHL to access e-application through iPipeline. · Must be licensed in the same state that the client resides. 	<ul style="list-style-type: none"> · E-App E-Signature Options · Intro to E-App

Telesales Carrier Guide – NON-APPROVED Carriers

Carrier	Notes
Athene	Carrier does not allow non-face-to-face sales.