Telesales Carrier Guide

Approved Carriers

Please remember to submit all business through OPT-.

To access the hyperlinks in this doc, please go to simplysfg.com/telesales and download the digital version.

Carrier	Approved Products	Method	Agent Requirements	Training Resources
AIG sharedservicesproducercare@aig.com **1-800-247-8837**	· 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.	· Must be contracted with AIG to access AG Quick Ticket on AIG's portal. · Must be licensed in state that client resides.	· AIG Quick Ticket Quick Reference Guide · AIG Quick Ticket User Functionality Guide · Client Guide – Preparing for Telephone Interview · E-Sign via DocuSign Training Video
	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.	· Must be contracted with AIG to sell GIWL product and access GIWL e-application. · Must be licensed in state that client resides.	· AIG GIWL eSignature Docusign Process Training
American Amicable marketingassistants@aatx.com **1-800-736-7311**	· Express Term · Home Certainty WL · Dignity Solutions · Security Protector · Survivor Protector	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 or a voice signature may be provided.	· Must be contracted with American Amicable to access e-application on American Amicable's portal. · Must be licensed in state that client resides.	· Producer Guide to Phone Sales · POS On Screen Decision for Final Expense · Voice Signature Process
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.	· Must be contracted with American Equity to access ReadyApp on American Equity's portal. · Must be licensed in state that client resides.	· Requirements for Non-Face-to-Face Sales · ReadyApp Tutorial

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Americo sales.support@americo.com **1-800-231-0801**	· 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.	· Must be contracted with Americo to access e-application on Americo's portal. · Must be licensed in state that client resides.	· E-Application Quick Reference Guide · E-Signature Training Video
	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.	· Must be contracted with Americo. · Must be licensed in state that client resides.	Eagle Premier TeleApp Worksheet
Athene **1-888-266-8489**	All Annuities	Communicate with client over the phone, while filling out Athene's e-application on Athene's portal. After information is submitted online by agent, the customer will receive an e-mail to complete the e-signature process.	· Must be contracted with Athene to access e-application on Athene's portal. · Must be licensed in state that client resides.	· E-App Overview · E-App Training Video · Guidelines for Phone + Video Solicitation
Columbus Life clsalesdesk@columbuslife.com **1-800-677-9696**	· 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.	· Must be contracted with Columbus Life to access e-application on iPipeline. · Must be licensed in state that client resides.	· User Guide to iGo · iGo + DocFast Training Video
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.	· 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.	· Video Sales Guidelines · E-App Training Video can be located in F&G agent portal homepage under "Sales Tools & Resources"

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Foresters nbunewbiz@foresters.com **1-866-466-7166**	· 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.	· Must be contracted with Foresters to access e-application on iPipeline. · Must be licensed in state that client resides.	· Non-Face-to-Face Guidelines · Using iPipeline iGO e-App
	PlanRight	Communicate with client over the phone while filling out the e-application (LiveApp). Then, conduct a three-way-call with the client and Foresters to walk through a PHI. Customer will then receive an e-mail to complete the e-signature process.	· Must be contracted with Foresters to access e-application through LiveApp. · Must be licensed in state that client resides.	· LiveApp User Guide · Electronic PlanRight Producer Guide · Training Video
Gerber gerberlifeagencysales@gerberlife.com **1-800-428-4947**	· 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. · Conduct a three-way-call with the client and Gerber's call center (1-877-885-7612). Gerber representative will collect voice signature at end of application process.	· Must be contracted with Gerber to access e-application on Gerber's portal. · Must be licensed in state that client resides.	· Training documents on e-application process found on Gerber's portal. · Call Center Phone App. Guidelines
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.	· Must be contracted with John Hancock to access e-application on Simple Term Microsite. · Must be licensed in state that client resides.	· E-App Walkthrough Video · E-App Flyer · Enhanced E-Signature Process

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Lafayette Life icenter@llic.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.	· Must be contracted with Lafayette Life to access e-application through iPipeline. · Must be licensed in state that the client resides.	· Guide to iGo eapp · iGO FAQ · Digital Solutions Training Video
Manhattan Life **1-800-999-2971**	All Viva Life Products	Communicate with client over the phone, while filling out paper application downloaded from Manhattan Life's portal. Use the client's mother's maiden name as the signature (no e-signature required). Once complete, submit the application through the Easy Upload feature on Manhattan Life's portal, or submit through the individualized application submission link received from the carrier.	· Must be contracted with Manhattan Life to access "Easy Upload" on Manhattan Life's portal (or use the individualized link provided by Manhattan Life). · Must be licensed in the state that the client resides.	
Mutual of Omaha **1-800-693-6083**	· 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.	· Must be contracted with Mutual of Omaha to access e-application through iPipeline. · Must be licensed in state that the client resides.	· E-App User Guide · Producer Guidelines
	· GUL Express · IUL Express	Communicate with the client over the phone, while filling out the fillable PDF application in Adobe. Send application to client via e-mail to collect client signature. Once application is complete, submit it through OPT.	· Must be contracted with Mutual of Omaha to download application from iPipeline. · Must have personal access to Adobe software with sign capabilities. · Must be licensed in state that the client resides.	· IUL Express Electronic Submission Training Video
	DI Choice	Communicate with client over the phone, while filling out the fillable PDF application in Adobe. Send application to client via e-mail or snail mail to collect client signature. Once client signature is obtained, submit application through OPT.	· Must be contracted with Mutual of Omaha. · Must have personal access to Adobe software with sign capabilities. · Must be licensed in state that the client resides.	· Paper App. Submission via E-Mail

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Mutual of Omaha **1-800-693-6083**	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.	· 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.	· 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.	· 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	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.	· 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.	· No Need Pin Bulletin · Sending Docs Electronically Guide · Using Mutual Trust Fillable PDF Applications · Obtaining Signatures During the COVID Crisis · Message and Document Upload Center Training Video
National Life Group agentservices @nationallife.com **1-800-906-3310**	· 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.	· 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.	· Accepting Remote Applications · eApp: Start New Case Training · eApp: eSignature Training · 7 Tips for Better Video · Annuity e-APP Rules of the Road

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North American Company salessupport@nacolah.com **1-800-800-3656**	· All Term · Custom Guarantee UL · 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.	· Must be contracted with North American Company to access e-application through iPipeline. · Must be licensed in the same state that the client resides.	· 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.	· 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.	· Annuity E-App: Step by Step Guide · E-App FAQ
Phoenix Life **1-888-794-4447**	· Safe Harbor 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.	· 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.	· 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.	· Must be contracted with Transamerica to access e-application through iPipeline. · Must be licensed in the same state that the client resides.	iGO E-App Training
UHL Uhl.newbusiness @unitedhomelife.com **1-800-428-3001**	· 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.	· Must be contracted with UHL to access e-application through iPipeline. · Must be licensed in the same state that the client resides.	· E-App E-Signature Options · Intro to E-App