

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	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 E-Sign via DocuSign Training Video
American Amicable marketingassistants@aatx.com 1-800-736-7311	<ul style="list-style-type: none"> 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.	<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 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.	<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

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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 	<p>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.</p>	<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 · E-Signature Training Video
	Eagle Premier WL	<p>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.</p>	<ul style="list-style-type: none"> · Must be contracted with Americo. · Must be licensed in state that client resides. 	Eagle Premier TeleApp Worksheet
Athene 1-888-266-8489	All Annuities	<p>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.</p>	<ul style="list-style-type: none"> · Must be contracted with Athene to access e-application on Athene's portal. · Must be licensed in state that client resides. 	<ul style="list-style-type: none"> · E-App Overview · E-App Training Video · Guidelines for Phone + Video Solicitation
Columbus Life clsalesdesk@columbuslife.com 1-800-677-9696	<ul style="list-style-type: none"> · Voyager UL · Explorer Plus UL · Indexed Explorer Plus IUL 	<p>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.</p>	<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 · iGo + DocFast Training Video
Fidelity & Guaranty 1-800-445-6758	All Annuities and IUL	<p>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.</p>	<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"

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Foresters nbunewbiz@foresters.com 1-866-466-7166	<ul style="list-style-type: none"> Strong Foundation Term Your Term Smart UL Advantage Plus II WL 	<p>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.</p>	<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. 	<ul style="list-style-type: none"> Non-Face-to-Face Guidelines Using iPipeline iGO e-App
	PlanRight	<p>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.</p>	<ul style="list-style-type: none"> Must be contracted with Foresters to access e-application through LiveApp. Must be licensed in state that client resides. 	<ul style="list-style-type: none"> LiveApp User Guide Electronic PlanRight Producer Guide Training Video
Gerber gerberlifeagency@gerberlife.com 1-800-428-4947	<ul style="list-style-type: none"> AD&D All WL 	<ul style="list-style-type: none"> 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. 	<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. 	<ul style="list-style-type: none"> 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	<p>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.</p>	<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

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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.	<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 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.	<ul style="list-style-type: none"> 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	<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
	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 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.	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> 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.	<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 	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 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	<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 7 Tips for Better Video Annuity e-APP Rules of the Road

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North American Company salesupport@nacolah.com 1-800-800-3656	<ul style="list-style-type: none"> · 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.	<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
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. 	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