

Policy eDelivery

Carrier	How to Register	Notes
American General	e-Delivery is available and can be elected anytime during the underwriting phase of the application, with an email to the CRM team. Please refer to the PDF in the shared drive for more details.	
Banner/William Penn	<p>Before registering you will need to:</p> <ol style="list-style-type: none"> 1. Decide whether you want layover or nonstop - or both. You can also select non-stop if the policy is approved as applied for or better and layover if the policy is approved worse than applied for. Layover - the policy is sent to your agency first. You have 5 days to review the policy to see if there are any concerns or if anything needs to be changed. Once you have determined it is okay you will then electronically sign the policy and it is released to the insured. 2. Non-stop - policy is sent to the insured and your agency at the same time. You will need to determine if you want it set up for all agents or a select few. 3. You will need to determine if you want eDelivery set up for AppAssist and/or traditional business. When offering it on AppAssist cases, during the interview we will ask the applicant if they want eDelivery. If they say no, we will send the paper policy to your office. For traditional cases (paper application) you will need to include the eDelivery Authorization form with the application or before the policy is issued. <p>Once you have sent in the registration form (attached) you will be contacted by DocuSign to set up the account. They will need an email address. Some agencies have set up a general email box that several people in the office have access.</p>	<p>Link to our microsite for eDelivery: https://www.lgamerica.com/edelivery/</p> <p>Please note eDelivery is not available for the following:</p> <ol style="list-style-type: none"> 1. Proposed insured, policy owner and payor must be the same person. 2. If eligible applicant must agree to have their policy eDelivered. 3. Not available for UL.
Equitable	e-Delivery is available through BGA DocuSign. Please refer to the PDF in the shared drive for more details.	
John Hancock	e-Delivery is not available.	
Lincoln	e-Delivery is available (no marketing pieces available per Tony Collazo).	

Mutual of Omaha	e-Delivery is not available.	
Nationwide	e-Delivery is not available.	
Pacific Life	e-Delivery is available. Please refer to the PDF in the shared drive for more details.	
Principal	e-Delivery is available. Please refer to the PDF in the shared drive for more details.	<p>Items to be aware of:</p> <ul style="list-style-type: none"> • All Term policies will automatically be e-delivered unless you ask before policy is approved • When the policy is issued, an email will be sent to the Field Office Contact we have on file <ul style="list-style-type: none"> - To access the policy, you will enter a 5-digit code. It is your office number starting with 0s to make it 5 digits. (ie: office number 111 would be entered 00111). - You will have 3 options after you review the policy • If there are issues, return it for correction • Print the PDF if the advisor wants to deliver a physical policy • Indicate it is ok, in which case an email is sent to the client for e-signatures
Protective	e-Delivery is available. Please refer to the PDF in the shared drive for more details.	
Prudential	e-Delivery is available. Please refer to the PDF in the shared drive for more details.	
Securian	e-Delivery is available on all products. Please refer to the PDF in the shared drive for more details.	