

Quick Tips for Submitting a Foresters Prepared Application

Avoid delays and get your client's Prepared application decisioned quicker...so you can get paid faster.

QUICK TIPS TO...	WHAT?	DOs & DON'Ts...
Pre-Screen Your Client	Occupation & Duties	<ul style="list-style-type: none"> Do check the Excluded Occupations in the Who's Not Eligible section of the Producer Guide
	Health & Lifestyle Questions	<ul style="list-style-type: none"> Don't submit if answered "yes"
Seamless Processing	Outline of Coverage	<ul style="list-style-type: none"> Do complete Premiums table on page 3, and <i>LEAVE THE DOCUMENT WITH YOUR CLIENT</i>
	Notices	<ul style="list-style-type: none"> Do <i>LEAVE THE DOCUMENT WITH YOUR CLIENT</i>
	Acknowledgement of First Premium	<ul style="list-style-type: none"> Do complete and sign, and <i>LEAVE THE DOCUMENT WITH YOUR CLIENT</i>
	Life Replacement Forms – in Florida and Indiana only	<ul style="list-style-type: none"> Do complete and submit <i>if a replacement is involved</i>
Save You Time	Premium Quote Printout	<ul style="list-style-type: none"> Don't submit or fax with the Prepared application
	Producer Report (from the Life application)	<ul style="list-style-type: none"> Don't submit or fax with the Prepared application
Get Paid Faster	Preferred Draw Date	<ul style="list-style-type: none"> Don't suggest to your client they choose a Preferred Draw Date
	Cash On Delivery (COD)	<ul style="list-style-type: none"> Don't request COD as the option is not available for Prepared
Last But Not Least	Authorization to Review and Transfer Information form	<ul style="list-style-type: none"> Don't submit with the Prepared application Submit with your client's Term application ONLY IF Prepared is selected as "fall back" solution in the event of a Term decline