

Save time with e-policy delivery

Discover a faster and more efficient way to move your life business with our optional electronic policy delivery process. This is a new digital solution that bypasses the physical delivery of a policy, allowing you to:

- Quickly return your client's policy, enabling your client to electronically sign and return the required trailing documents such as the policy delivery receipt
- Deliver your client's policy without scheduling an in-person meeting
- Retain digital copies for your records and save on postage spent from sending multiple copies

Here's how e-policy delivery works:

1		Nationwide® requires an Electronic Document Delivery Agreement (EDDA) to be signed by the policyowner prior to the contract being delivered
2		The policy is uploaded to DocuSign for e-delivery
3		The policy is emailed to the BGA Case Manager
4		The BGA Case Manager reviews the policy; if changes are needed, the policy is sent back to Nationwide, then returned to the BGA Case Manager for a final review
5		The BGA Case Manager approves or declines the policy
6		The policy is emailed to the financial professional
7		The financial professional reviews the policy; if changes are needed, the policy is sent back to Nationwide, then returned to the financial professional for a final review
8		The financial professional approves or declines the policy
9		A DocuSign envelope is routed to the policyowner when approved
10		The policyowner reviews and signs any required trailing documents electronically
11		All parties receive copies that can be downloaded or printed

Availability

Available in all states except New York

States	Requirements	Products
California	EDDA and a California-specific Opt-In Disclosure (included in the same envelope)	Nationwide YourLife® Guaranteed Level Term Nationwide YourLife® 20-Pay Whole Life Nationwide YourLife® Simplified Whole Life Nationwide® Indexed Universal Life Accumulator II Nationwide® Indexed Universal Life Protector II Nationwide® No-Lapse Guarantee Universal Life II Nationwide CareMatters® II
All other states	EDDA	Nationwide New Heights® Indexed Universal Life Accumulator Nationwide® Survivorship Indexed Universal Life

Things to consider

- Nationwide will use DocuSign to electronically deliver the policy contract, which allows for the client to sign any trailing documents electronically utilizing the provided email addresses for all parties involved
- Depending on outstanding delivery requirements, there may be multiple envelopes delivered through DocuSign, requiring an access code; the code is the last four digits of the client's Social Security number
- At each step along the way, there is the option to print, save or decline the DocuSign envelope



For more information, please contact your Case Manager.



Nationwide®
is on your side

• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution • Not insured by any federal government agency • May lose value

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