Prudential – eDelivery – Client Instructions

The following job aid includes step by step instructions for the consumer completion of the ePolicy Delivery signing process.

NOTE: Individuals will receive the email with the policy link once it is their turn in the signing process. Forwarding an email to a client will not provide access to the policy; they must access the policy via a link received in the automated email from the agent. A link to the policy envelope will be included in the email.

Step	Action	Screen Print/Example
1	The consumer will receive an <i>email</i> prompting them to access the policy by first completing the authentication steps. Select Access Your Policy.	Your life insurance policy is available for review Image: State in the image is a state of the image is a sta
2	Level 1 Authentication: The consumer will enter the last 4 digits of <i>their</i> social security number in the first field, followed by their full date of birth in the second field. (<i>ex: mmddyyyy</i>) Once entered, select Continue.	Login Welcome! Your Insurance document is available for review: To ensure your variant pressee answer the question(s) below: what are the last four digits of your SSH? What is your bithdate? (in MMDDYYYY format) Continue Trocble logging in?
3	Once the level 1 authentication has been completed, the consumer can proceed to Two-Factor Authentication by selecting Review and e-Sign Your Document	Consumer Life Policy Delivery Consumer Life Policy Delivery Review and eSign Your Document Presse cick on the button below to review your Document. If you need to change or update any information, or if you have any questions, please contact your agent. If you are satisfied with the information contained within the Document, please eSign your Document wherever if is indicated that an eSignature is required. Review and eSign Your Document
4	Two-Factor Authentication: Next, the consumer will be prompted to complete <i>either</i> Voice <i>or</i> SMS Text Message authentication. Once the call or text has been initiated, they will enter the 6-digit numerical code in the field provided and then select Send SMS	PolicyEX System Prudential - iPipeline SMS Authentication In order to access this document, please confirm your identity via text message, using your mobile phone. Review the phone number below and select the "Send SMS" button to receive a text message. If the phone number is incorrect or cannot receive text messages, select "Cancel" and contact your Financial Professional. Enter the access code on the following page. Authenticating Signer Name: John Doe Phone Number: f + 1651-33 CANCEL If you do not have access to your mobile phone at this time, select "Cancel" and retry when you have access.

5	Enter the 6-digit authentication code provided in the text message and select Confirm Code	PolicyEX System Prudential - IPipeline SMS Authentication An SMS message has been sent to your mobile phone. You should receive it momentantly. Please enter the code you received in the SMS text message in the field below and select CONFIRM CODE. CONFIRM CODE CONFIRM CODE If you do not receive an SMS text message, select CANCEL, verify the mobile phone number and try sending the SMS text message again. If you do not receive an SMS text message, select CANCEL, verify the mobile phone number and try sending the SMS text message again. If the phone number displayed previously is incorrect, please select "Cancef" and contact your Financial Professional.
6	A PDF copy of the policy and delivery requirements will be viewable to the CLIENT . The signing process will begin by clicking the CONTINUE and START button at the top left of the page. The CLIENT must review <i>all</i> the pages to ensure there are no changes to the policy. Select NEXT on the left of the screen to navigate and append signatures and dates to the requirements by selecting SIGN .	<text><text><text><image/></text></text></text>
7	If at any time throughout the signing process the client wishes to stop, they can select Other Actions , Finish Later. Their information will be saved, and they can re-access the policy documents via the email link. When they are ready to proceed with signing, select Start on the left- hand side.	Please roview the documents bedow. Please roview the documents bedow. The second sec
8	The consumer will be taken through the required policy delivery requirements and will sign each accordingly. The signature date will pre- populate with the current date and affix to the form.	If the policy features described showe do not adoptaticly much your fife insurance needs, please discuss this with your representative. Acknowledgment of Life Insurance Policy Delivery Check here if policy was delivered by mail and expresentative. Confirm that this policy number LoS51716 has been delivered to me. (Program:

9	The CLIENT will be required to make a selection on the <i>E</i> - <i>PAY/EFT</i> form. The selection will determine what additional fields are required on the form. These sections will be highlighted in red and be required to be entered to finish the signing process.	 The CLIENT will be presented with the option to complete the EPay/EFT form to authorize a one-time payment and/or set up reoccurring payments for inforce payments. Withdraw Initial Payment: One-time payment Withdraw Only Subsequent Monthly Payments: Reoccurring monthly drafts for inforce payments. Client will need to submit another form of payment if the contract was not fully prepaid. Pop Up Message: * Selecting this option establishes monthly payment withdrawals (electronic fund tansfers) after your poly is active. * If payment is due for placement please select the payment method within tansfers) after your poly is active. Mithdraw Initial Payment and Ongoing Monthly Payments: One-time payments: One-time payment (e.g. check, wire, etc.) if the contract was not fully prepaid. Mail Check or No Additional Premium: Client will need to submit another form of payment (e.g. check, wire, etc.) if the contract was not fully prepaid. Pop Up Message: Mail Check or No Additional Premium: Client will need to submit another form of payment (e.g. check, wire, etc.) if the contract was not fully prepaid. Pop Up Message: Withdraw Initial Payment and Payment (e.g. check, wire, etc.) if the contract was not fully prepaid. Pop Up Message: Weither Mitial Payment (e.g. check, wire, etc.) if the contract was not fully prepaid.
10	Once all signatures have been affixed to the delivery forms, select Finish in the top right-hand corner.	Andered states that the share of the sh

11	A confirmation window is displayed, and the consumer is given the option to print or save a copy of their completed policy. The agent and distributor also receive an email notification that the policy delivery has been completed.	Thank you! You've completed the Prudential electronic policy delivery process! Thank you! You've policy review and eSignature process are now complete and your eSignature has been applied to the policy and all supporting documentation. Once all signatures are completed the documents will be sent to Prudental for review. Please take a moment to print and/or save a copy of the eSigned policy and supporting documentation for your records by clicking on the button below. Thank you again for using our Electronic Policy Delivery System! Drank you again for using our Electronic Policy Delivery System! Click the button above to view your Document in Adober Acrobath Reader, where you can also print your document or save it to your Desktop.
12	Distributor or Agent: In the DocFast Dashboard, the Consumer icon will change to solid green, and the Signer Status section is updated to display the Insured as Completed Accepted Signature . The policy documents will be reviewed the same day if received by 4:00PM EST at Prudential.	Status: Delivery Requirements Received Carrier Distributor Agent Consumer Name Role Status Action Amin, Osaka Agent Completed Accepted Signature KATHYONE, KATHY Owner Completed Accepted Signature