

eDELIVERY STEP-BY-STEP GUIDE

When your client's Accelewriting[®] application is issued and policy pages are created, your client must log in separately to review and accept them. At this time, you have the opportunity to review those policy pages and print or save a copy for your file.

If your client's application is approved with changes and an illustration is required on delivery, those changes can be approved through a revised illustration, which you will sign and date. Once you've completed this step, you can send the policy pages to your client.

Below is a sample of the email you will receive, which will have a link for you to easily access DocFast. If you have not created a username before, go ahead and register now.

From: New Business <<u>policydelivery@ipipeline.com</u>> Date: Wed, Mar 4, 2020 at 5:54 AM Subject: ACTION REQUIRED - Policy XXXXXXXX for IUL PRODEDEL is available for your review and signature To: <<u>Email@Email.com</u>>

Dear Name,

The above referenced policy has been issued with a revised illustration and requires your electronic signature. The consumer will not receive the link to their policy until you complete your electronic signature first, and then forward the policy link to the consumer.

Step One: Producer Signature

- 1. To sign the revised illustration, click on the link below and log into the Agent DocFast Center.
- 2. Click the blue 'Document Actions' button located in the top right corner.
- 3. Click on the 'e-Sign and e-Deliver to Consumer' button, this will take you to the DocuSign Page.
- 4. Select the green 'Continue' button to guide you through the signing process.
- 5. Select the green 'Start' button.
- 6. Select the yellow tag with the red arrow to create and add your signature.
- 7. Click the green 'Finish' button to complete the signing process.

Please note instructions are located in the blue bar at the top of the page throughout the process.

Step Two: Send the policy link to the Consumer for their acceptance and electronic signature.

- 1. The 'Finish' button from step 7 above will take you to pop-up window titled Send Document.
- 2. Click the blue 'Continue' button.
- 3. Click the blue 'Send-email' button to send the policy link to the Consumer.

4. The next screen will advise 'Success!' and 'The documents have been sent to the customer(s) for review'. Click the blue 'Close' button. You have completed the process.

If you need assistance with this process, please contact the Producer Resource Center at 888-724- 4267, extension 4680. Thank you for using Sagicor's Electronic Application and Policy Delivery process.

Click here to access the document package.

Regards, Sagicor Life Insurance Company

Review the policy and the illustration

Once you've logged into DocFast, you will see all the policies you currently have pending for eDelivery.

Select the appropriate one to be reviewed by clicking on the **blue "Document Actions" button**.

Select "**e-Sign and e-Deliver to Consumer**" in the dropdown.

No additional action is needed if a revised illustration is not required.

Click the **green** "**CONTINUE**" **button** to begin your review.







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	Sagicor March 04, 2020		
	IUL PRODEDEL 123 ST MESA AZ 8500		
	Re: Policy No: JOCOCOCOC Owner: IUL PRODEDEL Insured: IUL PRODEDEL		
	DEAR MR. IUL PRODEDEL,		
	WELCOME TO SAGICOR LIFE INSURANCE COMPANY.		
	Your application is approved in the amount of \$175,000.00 as of March 5, 2020. Please take the time to review the policy. You have the right to return it within 30 days of the policy delivery and receive an unconditional full refund of all premiums paid.		
	Sagoor Uki Insurance Company has been in business since 1954 and has experienced controlled growth and conservative management that has yielded ever \$11. billion in assets. It is our commitment to back policyholder reserves through investments in high-quality assets that can be appreciated on the server and the server and the server server that the server the server the server		
	Your representative has informed on that all cogies of the table material used in the presentation of the piloty have been this with your. These tables immediated can be available resource and the information contained in them may be used to help you tables resource and used in the pilot of the tables and the tables and tables and tables and tables and tables and tables and tables and tables within the pilot of tables reference. If you do not necessing used and tables tables and your piloty or need any assistance places from the to contain any used material. None quanticate at 16 abre 2014, the contained tables and tables and tables and tables and your piloty or need any assistance places from the not contain any used more and tables and any tables and tables and tables and tables and above tables and tables and tables and tables and tables and any and tables and tables and tables and tables and tables and any any and tables and tables and tables and any and tables and tables and tables and and any and tables and tables and tables and any and tables and tables and tables and tables and any any and tables and tables and tables and any and tables and tables and tables and any any any any any any any any any any		
	Thank you again for choosing Sagicor Life Insurance Company. We look forward to serving you and your family in the years to come.		
	Sincerely,		
	1011-		

eSign the document

Click the **yellow tag** to create and add your signature once you've finished reviewing the illustration.



The signature is now complete.

Click the green "FINISH" button.

	TEAM 30, AUG 30						
	Accumulation Value	\$6,739	\$3.600	\$13,408			
	Cash Surrender Value	\$5,077	\$7,938	\$11,745			
	Death Benefit	\$100.000	\$100.000	\$100.000			
	YEAR 25, AGE 70						
	Accumulation Value	\$12,829	\$28,145	\$55,666			
	Cash Sumender Value	\$12,629	\$28,145	\$55.668			
L	Death Benefit	\$100,000	\$100,000	\$113,679			
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Forward the documents to policyowner

Check to make sure your client's email address shown is correct.

Click the **blue** "**Continue**" **button** to forward the policy and the illustration to your client.

Click the **blue** "Send e-mail" button.

First Name	Last Name		
IUL	PRODEDEL	Signing Method	
-mail Address		• Email	
NAME@SAGICOR.	СОМ		

Send e-mai	I notification for eSignature to individual(s)
То	NAME «NAME@EMAIL.COM»
cc	
BCC	
Subject	Policy XXXXXXXXX is Available for Review Online Attachments
Back	Preview M Send e-mail Cancel

Your client will receive an email with a link to access their policy.

agi	cor
Dear IU	L PRODEDEL
Congra Life Ins Policy \$	tulations on your decision to protect the future of your loved ones with life insurance from Sagicor urance Company. Below is a link for online access to review your Sagicor Life Insurance 3000XXXXXX.
If you h to hand	ave any questions, please do not hesitate to contact your producer. Thank you for allowing Sagicor le your life insurance needs.
Access	Your Life Insurance Policy
	Access Your Policy

Thank you for choosing our eDelivery process for your Accelewriting application. For more information, please call the Producer Resource Center at **888-724-4267**, ext. **4680**, or email **PRC@SagicorLifeUSA.com**.

Visit us online at SagicorProducer.com.

Insurance and annuities issued by Sagicor Life Insurance Company and not available in all states. Home Office: Scottsdale, AZ. Sagicor is rated "A-" (Excellent) by A.M. Best Company (4th best out of 16 possible ratings), affirmed as of September 11, 2020. Rating and guarantees based on the claims-paying ability of issuing insurer.