

5 SIMPLE STEPS TO POLICY eDELIVERY SUCCESS

Access your policy

Once you receive an email from **PolicyDelivery@iPipeline.com**, click the "**Access Your Policy**" **button** to get started.

Note: If you do not click on the button in the email within three (3) calendar days, a new email reminder will be sent to you.

Afterwards, if you still did not click, reminder emails will be sent to you every seven (7) calendar days.

The link will expire in 30 days.

Log in to the Sagicor Consumer Portal When you click the "Access Your Policy" button, you'll arrive at the Sagicor Consumer Portal.

Log in with the last four digits of your Social Security number and your date of birth, (mm/dd/yyyy), i.e., 01/07/1984.

Click the "Continue" button.

Review and eSign your document

Click the **blue button** to review and eSign your document.

Sagicol S
Dear Client Name,
Congratulations on your decision to protect the future of your loved ones with life insurance from Sagicor Life Insurance Company. Below is a link for online access to review your Sagicor Life Insurance Policy XXXXXXXXX.
If you have any questions, please do not hesitate to contact your producer. Thank you for allowing Sagicor to handle your life insurance needs.
Access Your Life Insurance Policy
Access Your Policy





You'll advance to a screen that gives you two options:

Click the **green** "**Continue**" **button** to proceed to the steps to secure your policy.

- OR -

Click the **blue** "**Other Actions**" **option** to proceed to the steps to secure your policy.

The **blue** "**Other Actions**" **option** features a dropdown menu.

If you choose "**Finish Later**", you can log back in to complete the process. You'll need to pull up the original email from **PolicyDelivery@iPipeline.com** and click the "**Access Your Policy**" **button** to get started.

If you choose "**Decline to Sign**", your policy will be cancelled.

After you click the **green** "**Continue**" **button**, you'll have access to review your policy.

Scroll through all the policy pages to ensure you review your policy in its entirety.

Once you've completed your review, click the **green** "**Start**" **button** in the upper left.

At this time, you'll be able to accept your policy by clicking on the "**Click Here to Accept Policy**" **button**, unless you have:

- Other documents to sign or

- Delivery instructions to sign

See the next two screens for more information.

[If you have other documents to sign]

If there are other documents associated with your policy, such as an amendment or an illustration, you'll be prompted to accept each required document.

Keep clicking on the **green** "**NEXT**" **button**, in the upper left.



CONT	TINUE	OTHER ACTIONS -	
		Finish Later Decline to Sign	
		Help & Support 🗗 About DocuSign 🗗 View History View Certificate (PDF) 🗗 Session Information	





[If you have delivery requirements to sign]

If there are any delivery requirement documents that need to be reviewed and approved by you, click on the **green** "CHOOSE" button in the upper left.

Once you've completed your review, accept your policy by clicking on the "**Click Here to Accept Policy**" **button**.

At any time, you can print and download the pages of your policy and other documents, or minimize and maximize your view by selecting the appropriate icon at the top.

		OTHER ACTIONS T
	Q, Q, 🛃 🖶 💿	
	DEMONSTINATION DOCUMENT UNLY PROVIDED DE DOCUMENT ONLINE STORME 99 Tal due Study 100 - Stantin - Machineron Bittal - JORN 715-0000	
СНООБЕ	Click Here to Accept Policy	
Sag	GICOT February 06, 2020	
Client N Addres Addres	Nama S. S	
Re:	Policy No: X00000000X Owner: Client Name Insured: Client Name	
Dear C	tient Name,	
WELC	COME TO SAGICOR LIFE INSURANCE COMPANY.	
Your a time to receive	application is approved in the amount of \$XXX,XXX as of February 6, 2020. Please take the or review the policy. You have the right to return it within 30 days of the policy delivery and e an unconditional full return of all premiums paid.	
Sagioc growth comm	or Life Insurance Company has been in business since 1954 and has experienced controlled and conservative management that has yielded over \$1.1 billion in assets. It is our itement to back policyholder rearves through investments in high-quality assets that can	

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СНООЅЕ	\$	DEMONSTRATION COOLMENT ONLY Ref DocuMent On A Ref Service Ref DocuMent On A Ref Service Ref DocuMent On A Ref DocuMent On A Ref DocuMent www.exampr.com Click Here to Accept Policy	
	Sagicor	February 06, 2020	
	Client Name Address Address		

eDelivery — if you've chosen a monthly payment option

If during the eApplication process you chose to pay monthly by completing an EFT form, you've completed the eDelivery process and may close the window.



You have coverage.

eDelivery — if you chose not to pay monthly premiums

Select whether you'd like to pay your initial premium with a credit card or personal check.

Sagicor 🍣 Consumer	Portal	
	Payment Plan	
Your Policy Effective Date is 2/1 Initial Payment Amount Due: \$ Select Payment Type	0/2020 SKX XX	
Pay by Credit/Debit Card	Using this method of payment will provide you with immediate life insurance coverage.	
VISA 😂 📷	Please note you will not have life insurance coverage until your payment is received.	

[Credit card payments]

If you choose **"Pay by Credit Card"**, you will receive premium information.

Click on the **blue** "**Confirm & Continue**" **button** to enter your credit card information.

Once you've completed the fillable fields, the process is complete, and you have coverage.

Since Sagicor does not store your credit card information, you will receive a billing statement on regular intervals, based on the payment mode you selected on your application.

You will need to complete the fields with your credit card information to maintain your coverage.

	Payment Selection Confirmation			×
	Policy Informati	on	Bill To	
r Po	Insured	Client Name	Client Name	
al F	Face Amount	\$XXX,XXX.XX	Address	
			Address	
ect	Initial Payment A	mount		
	Pay With		Credit Card	
ay	Amount		\$XX.XX	e
Pa_	Confirm	& Continue	Go Back To Payment Options	

Process Payment		
Card Holder Name		
Credit Card Number		
VISA 😂 🔤		
January • 2020 • CVC Number		
USD \$ \$XX.XX		
Pay \$67.60		

[Personal check payments]

If you prefer to pay with a personal check, simply follow the instructions on the screen to submit your initial premium payment to Sagicor Life Insurance Company.

	Payment Plan
Your Policy Effective Date is 2/10/	2020
Initial Payment Amount Due: \$X	XXX
Select Payment Type	
Pay by Credit/Debit Card	Using this method of payment will provide you with immediate life insurance coverage.
Pay by Personal Check	Please note you will not have life insurance coverage until your payment is received

Follow the instructions for submitting your initial policy payment.

Click on the **blue** "**Confirm & Continue**" **button**.



Thank you

Your policy will be placed in force as soon as your premium is drafted or received.

No further action is needed.

Your review is now complete. Thank you for using Sagicor's Electronic Application and Policy Delivery process!

You will receive a billing statement for future premiums at the address listed on your life insurance application and based on the payment mode you selected.

Thank you for choosing Sagicor Life Insurance to protect you and your loved ones. For more information, please contact your financial professional.

Visit us online at <u>Sagicor.com</u>.

Sagicor Life Insurance Company issues life insurance and annuity products. Home Office: Scottsdale, Arizona. Policies are not available in all states. State variations may apply.

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.