

E-POLICY DELIVERY PROGRAM

AN INTEGRAL PART OF SBLI'S ACCELERATE EXPERIENCE



THE E-POLICY DELIVERY PROCESS

OPT-IN	Agency is opted-in to e-Policy delivery.
APPLICATION COMPLETION	The client works with a fulfillment center to complete the application over the phone, and signs it via voice-signature. ¹
EMAIL SENT	Once the policy is approved and issued, an email is automatically sent to the client with instructions on how to register for an SBLI account and access their policy documents.
ALERT NOTIFICATION	The agency / agent is simultaneously sent an alert notification that the policy has been approved and issued.
POLICY DELIVERY	The policy and all delivery requirements can be accepted, signed, and paid for online by the client with coverage beginning as of the policy issue date.

POLICIES ELIGIBLE FOR E-POLICY DELIVERY

- Proposed insured, policy owner, and payer are the same.
- It is not a conversion policy.
- Proposed Insured has not declined e-Policy delivery.
- The acceptable outstanding delivery requirements are initial premium payment, Good Health Statement, delivery receipt, and applicable amendment.

KEY FEATURES

EASY	SIMPLE	CONVENIENT
No face-to-face contact necessary No action required by agency or agent	Email to client has customer friendly, easy-to-follow instructions Policy and delivery requirements can be accepted, signed and paid for by the client online	Improved placement Faster commissions

If you'd like your agency to be set up, or if you need any additional information or training on our e-Policy delivery program and process, please contact our Brokerage Sales Desk at 1-888-224-7254 (option 1) or email brokerage@sbli.com for assistance.

¹Voice signature is not available in Connecticut. For the education of producers/brokers only. Not for use with the public. SBLI is a registered trademark of The Savings Bank Mutual Life Insurance Company of Massachusetts, Woburn, MA. NAIC #70435. Licensed in 49 states and DC (excludes NY). Products and features may not be available in all states. © 2023 All rights reserved. SBLI is in no way affiliated with SBLI USA Life Insurance Company, Inc. 07/2023