AG QUICK TICKET®

Quick Reference Guide and User Tips

Also applicable for LifeSpeed, iGO Drop Ticket, Vive and Express Complete users

IMPORTANT

Quick Ticket Reminders

- Insured must also be the payer
- Only formal applications are accepted
- Not available for New York replacements, or 1035 Exchanges
- Telephone interview must be conducted directly by client in English or Spanish. Interpreters may not be used.
- Do NOT use Quick Ticket if you plan to schedule the exam yourself or use another carrier's exam. In those cases, please submit a paper application.

CONTACTS

- For questions about a Quick Ticket case before the paramed (if required), contact our dedicated ExamOne team at 800-225-6344 or Dmdirectresponse@examone.com
- For case status and general questions, reach out to your Contact Center or email your dedicated pending requirements team

Use AG Quick Ticket to get your case off to the *best possible start!*

- Ticket entry reduces chances of application error and delays
- Streamlined process to underwriting review
- **Agile Underwriting+ available!** Term, IUL and GUL cases submitted by AG Quick Ticket may be eligible for our lab-free AU+ program which offers a fast and convenient path from submission to approval.[1]

HOW IT WORKS

Ticket Entry
Launch AG Quick Ticket in Connext (or enter drop ticket through one of the platforms listed above).

Telephone Interview
Client called within 1 business day to complete application. If exam is needed[2], interviewer can schedule with the client.

Client eSigns After Interview
Optional but recommended. Case review begins after eSignature is received.

THAT'S IT!

Use Connext to stay up to date on any changes or requirements, including if labs are needed. If labs are not required, we will notify you quickly of the final underwriting decision.

[1] Conversion products are not supported by AG Quick Ticket.
[2] Paramed exam is not required for cases that qualify for Agile Underwriting+.

Get ***Tips and Tricks*** on the next page >
For additional information and resources, see our ***AG Quick Ticket Playbook***.

AG QUICK TICKET

Tips and Tricks

AG Quick Ticket Entry

- Temporary coverage (LTLIA) is available. Select Bank Draft as payment method during ticket entry
- Electronic policy (e-policy) delivery available for Select-a-Term only.
  Select it in the Insured screen during ticket entry.
- Case status available in Connext within 1 business day after ticket is submitted (unless there is an agent error)
- Complete ALL sections of the drop ticket, including the Riders and Existing Insurance/Replacement sections
  - If any inforce policies will be replaced, complete and submit the Replacement Addendum
- To avoid delays in matching laboratory results with your case:
  - Enter the correct Date of Birth and the **full** SSN on the application
  - Make sure your client knows and provides the exact same name to the paramed examiner that you provided on the application – including middle name or initials, Jr. or Sr., etc.

Telephone Interview

- Use ExamOne's portal to check times and status of telephone interview and paramed, and to view case paperwork. See Checking Ticket Status and Paperwork for instructions
  - Need access to the ExamOne site? Just ask your CRM for help getting set up.
- Voice mail messages will be left by the interviewer if the client is not reachable. Client may call back at their convenience (1-888-876-3407 for English; 1-866-768-2705 for Spanish). Client has 14 days to complete interview before case is closed.

Client eSigns After Interview

- Using eSignature provides the quickest processing, since case review begins after the eSignature is received. DocuSign link is valid for 15 days.
- Form compliance, replacement review and agent validation begins 1-2 days after eSignature received
- Use eSignature status in Connext to stay on top of possible issues

Paramedical Exam

- Help your client be prepared for the tele-interview and exam with
  Preparing For Your Telephone Interview and Life Insurance Exam
- Formal underwriting begins approx. 7 days after labs and physical measurements are completed by the client
- Need a copy of the medical records and exam information?
  See our Ordering Medical Records and Exam Copies guide for forms and other tips.

MiscellaneousTips

- Issue state is where policy owner signs application
- For wet signatures, insured is responsible for collecting signature from the owner and returning to ExamOne
- Make sure your agent code is accurate. A wrong agent code may delay your case or even tie the case to another agent.
- For Florida cases, additional Replacement forms may be required if they are not completed during ticket entry: Forms AGLC120Z8C, L4035, and LD2606