

Legal & General America | Digital Application Platform | June 2020

Accessing the 'View Case Documents' Button



How To

Access case documents from the Partner Dashboard once a final underwriting decision is made.

- Click on the **Documents** tab
- Click on **View Case Documents**

PARTNER DASHBOARD | Select a broker | Partner Tools | D2C Agent

DASHBOARD

Back to Search Results | Print

Policy #5001

Status: Active - Normal	Face Amount: \$1,000,000.00
Effective Date: 02/24/2020	Underwriting Class: Standard Plus Nontobacco - Table 09
Broker(s): BANNER LIFE INSURANCE COMPANY (D2C0000) 100%	Flat Amount: \$7.50
Insured Name:	Billing Mode: Monthly EFT
Insured Date of Birth:	Modal Premium: \$984.69
Insured Gender: M	Policy Paid To : 02/24/2020
Insured Issue Age: 51	Last Bill Generated Date:
Product: OPTERM 10 January 2020	

Beneficiary(s) | **Documents** | Relations | Agent Hierarchy | Notes

No results found.

[View Case Documents](#)

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- If the policy has been issued, the Policy Print can also be downloaded and printed within this documents tab.

Beneficiary(s) | **Documents** | Relations | Agent Hierarchy | Notes

Date Generated	Description	Type	
6/24/20	Issued Policy Print	PDF	

[View Case Documents](#)

- Click on the **blue folder** located in the upper right corner

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#500 OPTERM10 \$1,000,000

Status: Application Approved
Submitted 02/24/20

Case Details

Applicant	Suffix Miss	Driver's License
Product	First Name	DL State of Issue
Agent	Middle Name	Street
Beneficiary	Last Name	Apt / Suite
Owner / Payor	Gender Fema...	City
Vendor status Feed	D.O.B 05/06/1969	State
E-Delivery	Age 51	Area Code
		Insurance Age 51
		Save Age

Notes

Filter Notes...

- PR Pradeep Kumar February 24, 2020 2:53 PM Application Approved
- SY System February 24, 2020 2:39 PM Further Evidence Required
- CU Customer February 24, 2020 2:38 PM Application Complete
- CU Customer February 24, 2020 2:38 PM Completed
- CU Customer February 24, 2020 1:13 PM Application Started

Items per page: 5 1 - 5 of 6

- User can click on any document such as the application package or medical documents to view and download.

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ID #500 OPTerm10 Go to Case →

Filter...

Application

Application Package	2/24/20, 2:38 PM
PrivacyPolicy	2/24/20, 2:38 PM
ADB	2/24/20, 2:38 PM
HIPAA	2/24/20, 2:38 PM
AgentReport	2/24/20, 2:38 PM
02	2/24/20, 2:38 PM
01	2/24/20, 2:38 PM
Part2	2/24/20, 2:38 PM
Part1	2/24/20, 2:38 PM

Application Package.pdf Download

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Banner Life Insurance Company
Individual Life Insurance Application

Information and Underwriting Practices
(Including MIB, Inc. Notice and Fair Credit Reporting Act Notice)

As used in this application for life insurance, references to "you" mean the proposed insured.

Underwriting
Once we receive your application, we will begin an evaluation process called underwriting to determine whether you are eligible for insurance and, if so, the rate you should pay for that insurance. We may find that we are unable to give you the insurance you have applied for or that we are able to give it to you only on a modified basis or at a rate greater than our lowest rate.

Your application will be our primary source of information; therefore, it must be true, complete, and accurate. You must inform us of a change to any answer in any part of your application before accepting delivery of a policy; in fact, you agree to do so when you sign your application. We will seek information from other sources to help us evaluate the information you give us on your application.

Contestability
We strongly urge you to review the completed application closely for accuracy. A claim may be denied, the policy may be void or your coverage may be lost if the application is incomplete or if it contains false statements or material misrepresentations. Any policy that may be issued will indicate when and under what circumstances it may be contested. Please be aware that if the application contains material misrepresentations or conceals material facts, and you submitted it with the intent to defraud or to facilitate fraud against us, you may also be guilty of insurance fraud, which is a crime. You must inform us of a change to any answer in any part of your application before accepting delivery of a policy; in fact, you agree to do so when you sign your application.