Drop a ticket from Partner Dashboard

Last updated December 2023

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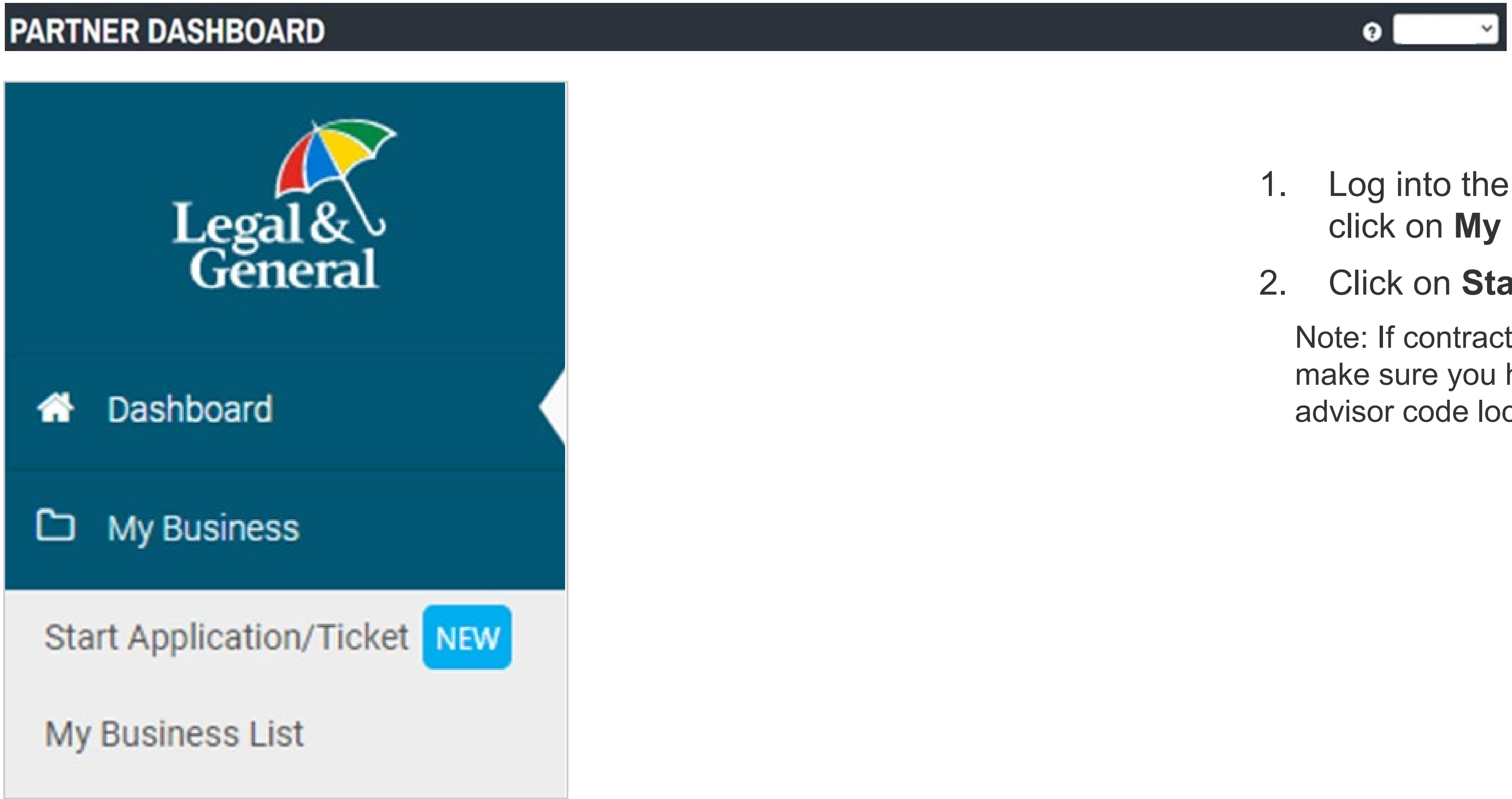

1. Log into the Partner Dashboard and click on **My Business**
2. Click on **Start Application / Ticket**

Note: If contracted with more than one GA, make sure you have selected the correct advisor code located at the top of the screen

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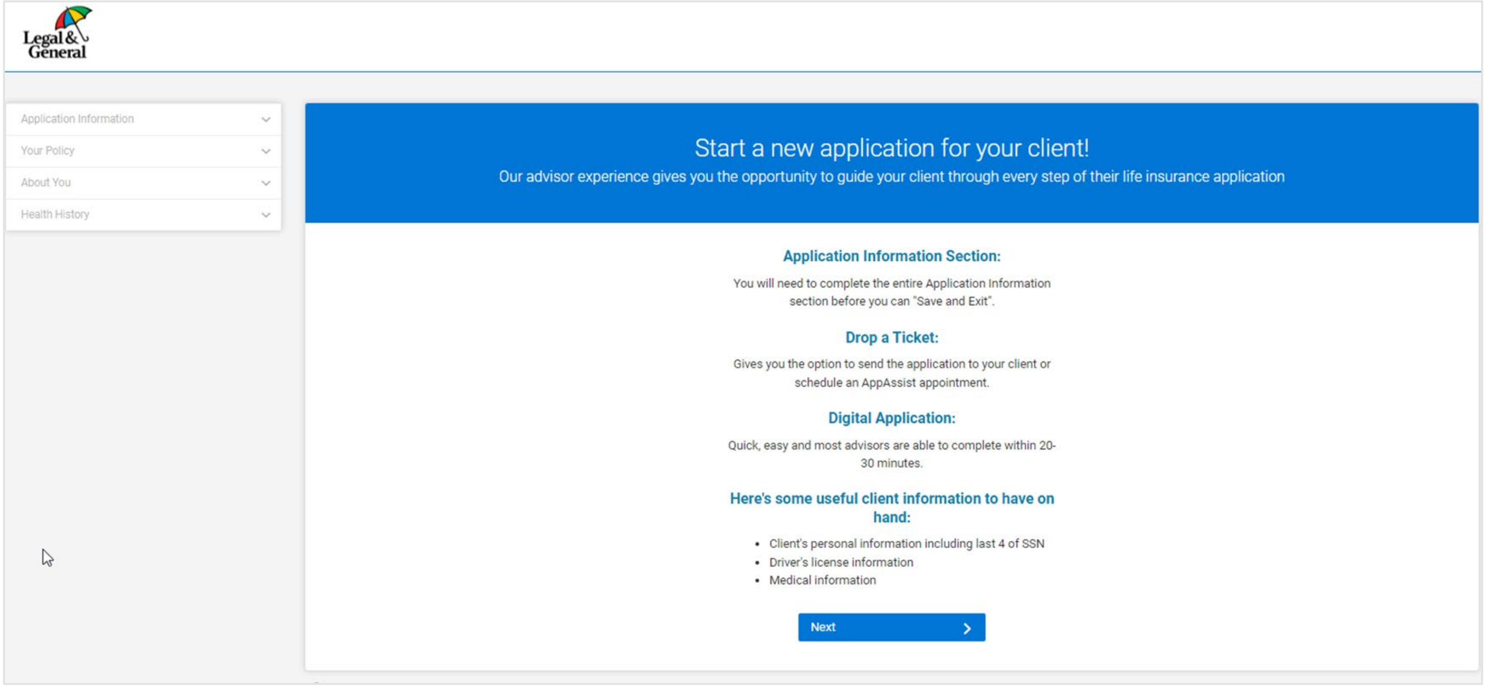

3. Landing page
   a. When using the GA link, you will land on this page
   b. Select **Next**

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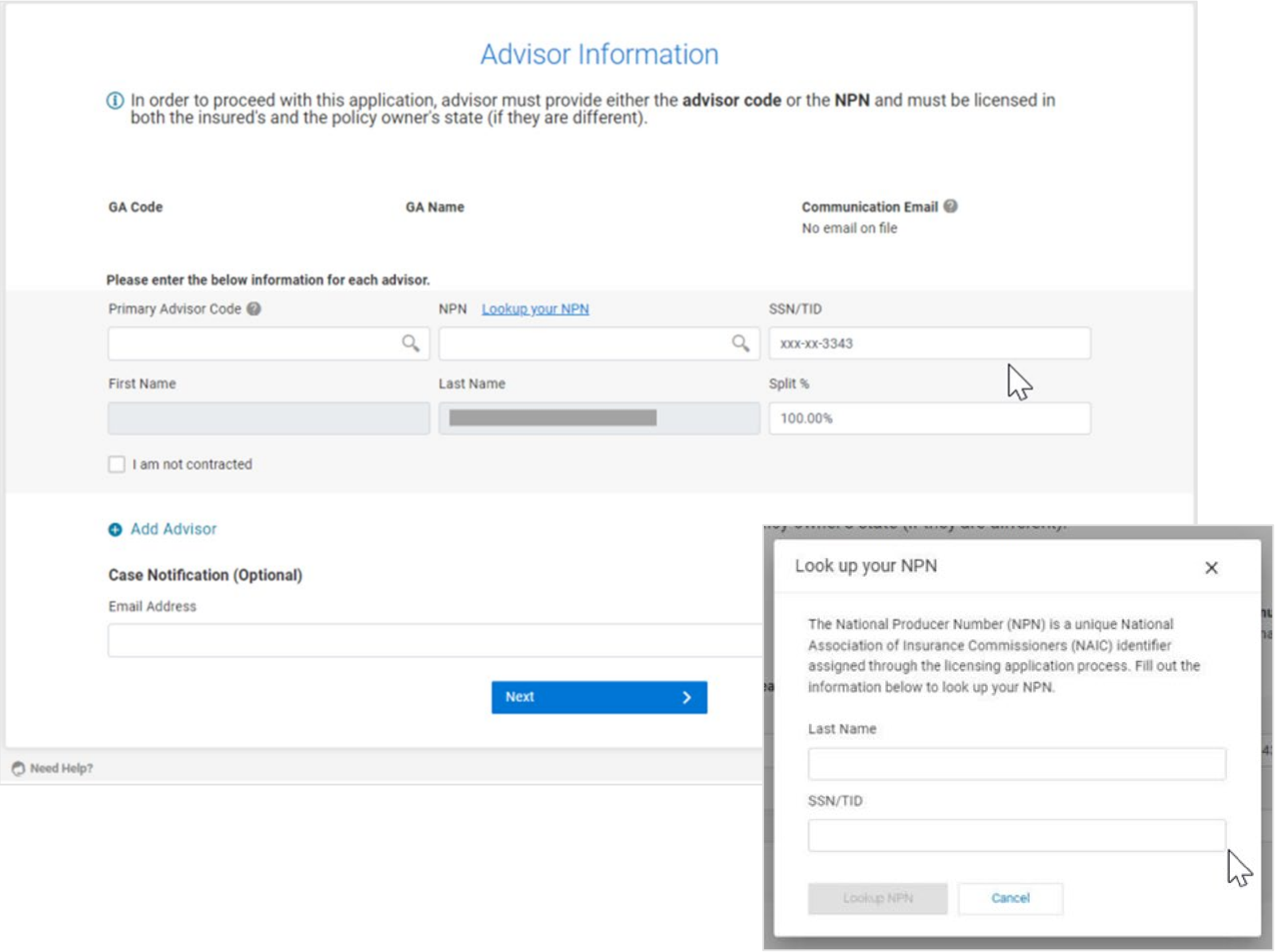

4. Advisor Information

   a. Please review the GA name at top to ensure this is the correct agency the business is to be submitted through

   b. If needed, enter your advisor code; if you do not know your code, enter your national producer number (NPN) and last four of your social security number or TIN, depending on how you are licensed

   c. If not contracted with this GA check the **I am not contracted** box; enter NPN and last 4 of SSN or TIN

   d. Select **Next**

Note: If you do not remember your NPN click on **Lookup your NPN**

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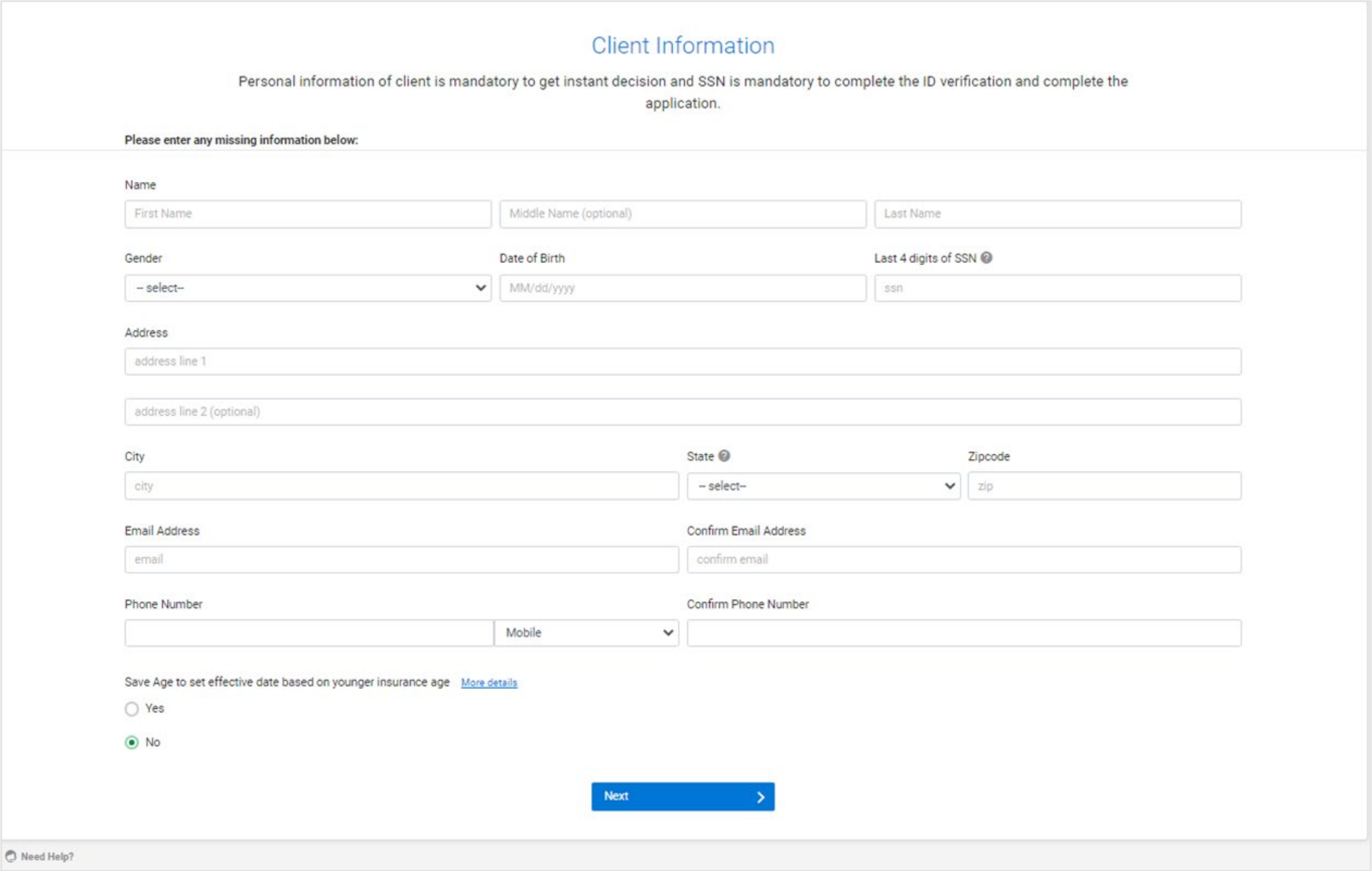

5. Client Information
   a. Complete all fields
   b. Select **Next**

Pro Tip

The issue state is based on where the **policy owner resides**; please make sure you are licensed in that state

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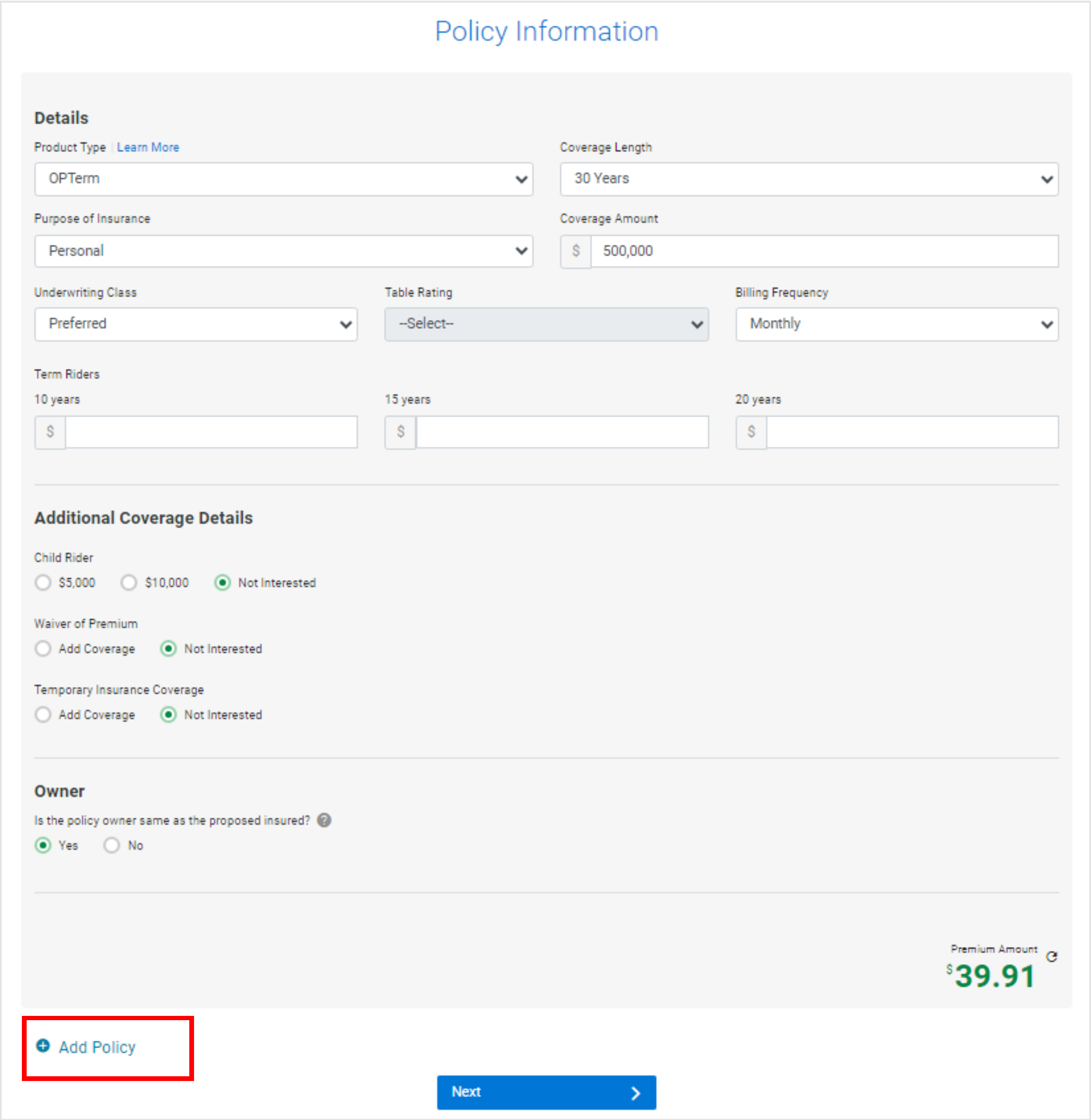

6. Policy Information
   a. Complete the appropriate fields
   b. If the owner is other than the insured, the agent will need to provide the owner's name, address, phone number and email address
   c. Select **Next**

Pro Tip

When multiple policies are needed:

If the client is applying for more than one policy, after entering the initial information click **+Add Policy** located in the bottom left corner

This will allow you to enter the information needed for each additional policy the client is applying for (up to three total)

When completing the applications the client will only need to repeat the 'Your Policy' details for each policy being applied for

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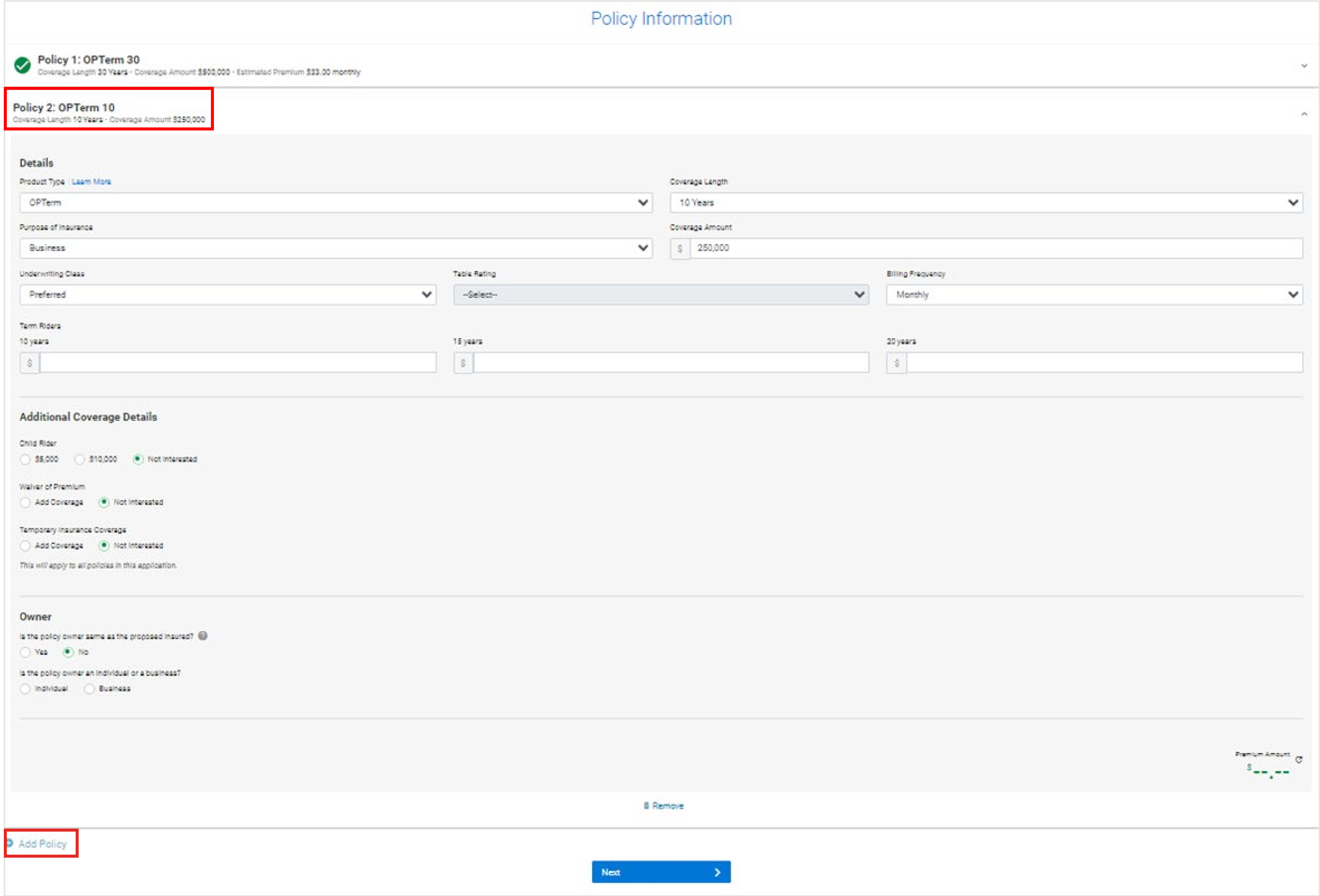

Multiple policies cont.

- Enter the information needed for the second policy; repeat for the third, if needed

Once the information is entered for each policy being applied for, click **Next**

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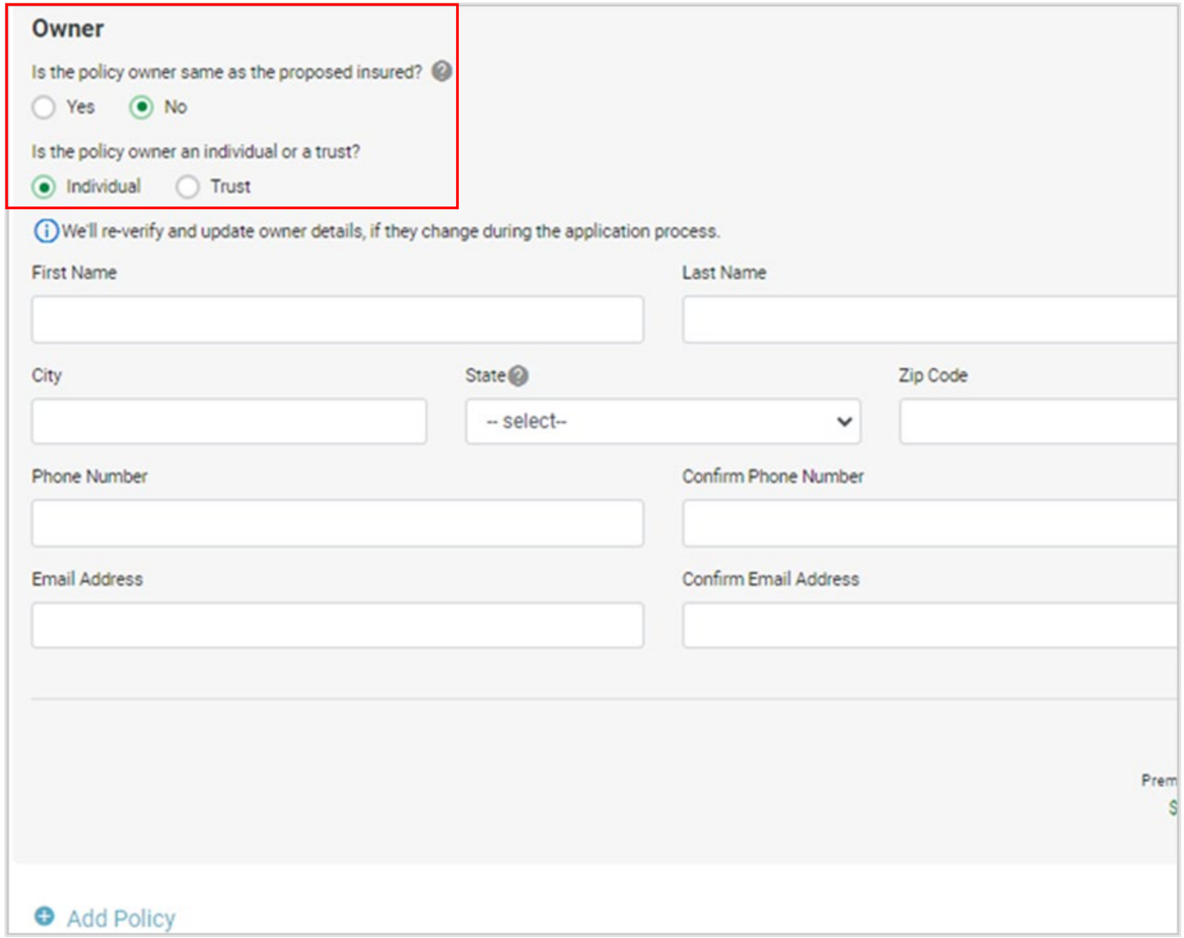

Pro Tip

When the policy owner is other than the insured, the policy owner's name, address, phone number and email address are required

Note: The state of issue is determined by where the owner resides, you must be licensed in that state

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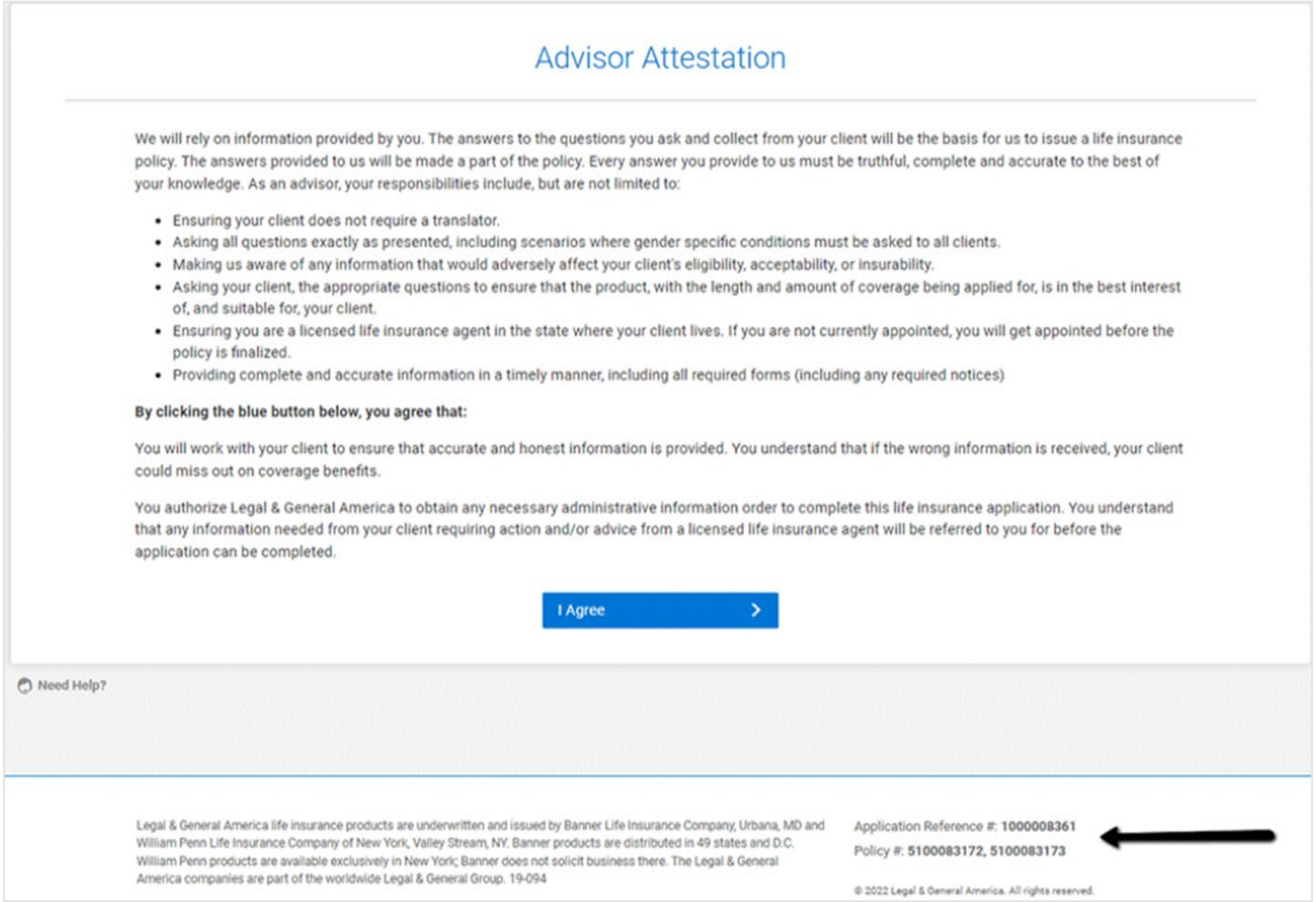

7. Advisor Attestation
   a. Click **I Agree** to the terms and conditions

Note: Application reference number and policy number(s) will appear in the bottom right corner

- There is one Application Reference number and will link all associated applications
- Policy number will be unique for each policy applied for

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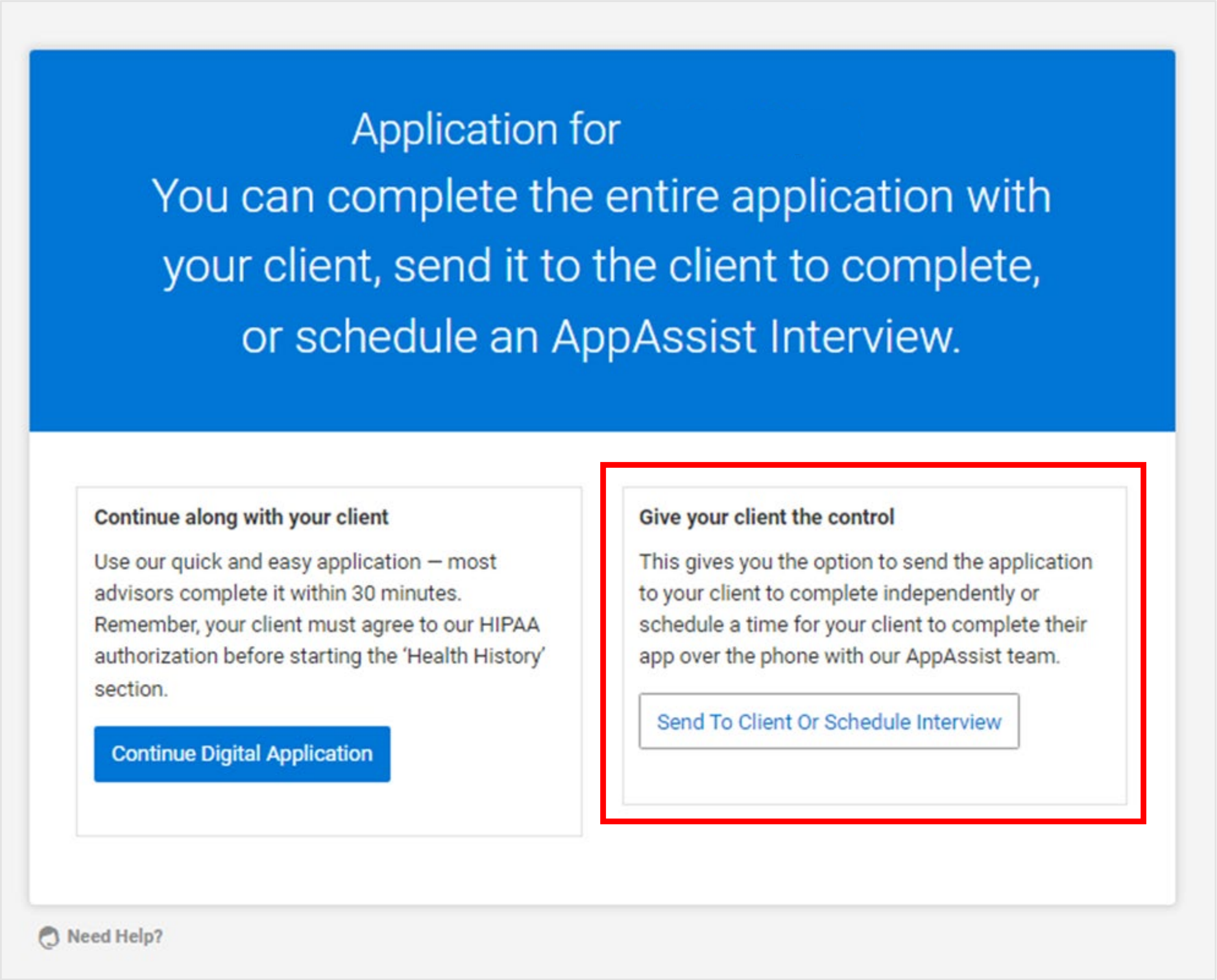

8. To drop a ticket, click on **Send To Client or Schedule Interview** button

Note: This will allow the client to complete the application themselves online or complete the application over the phone with our call center staff

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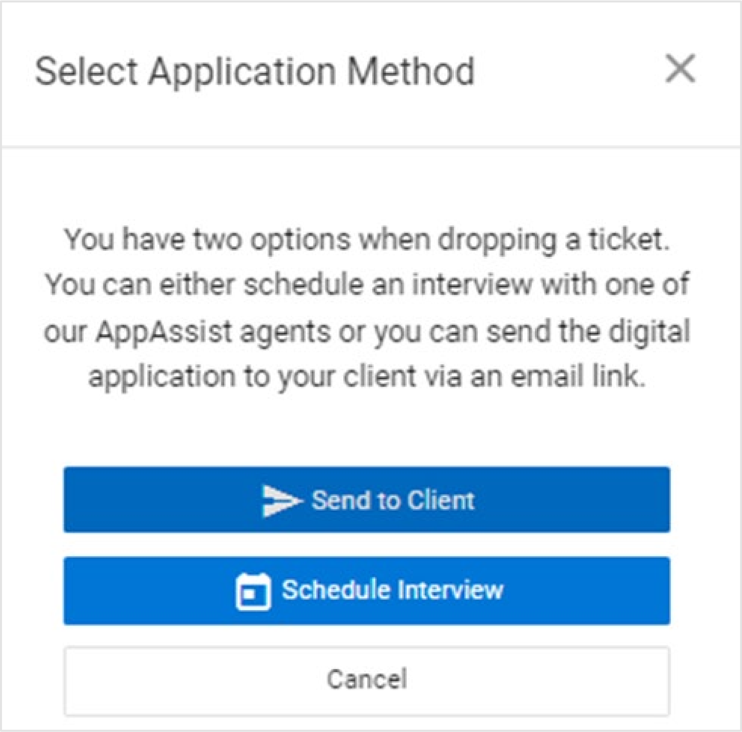

9. Drop a ticket: Two options
   - Send the digital application to your client via an email link or
   - Schedule a phone interview with one of our call center staff

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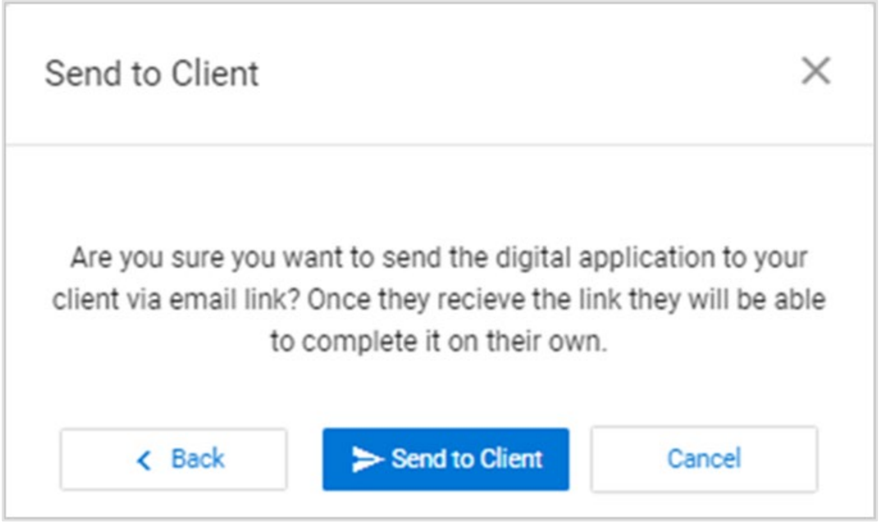

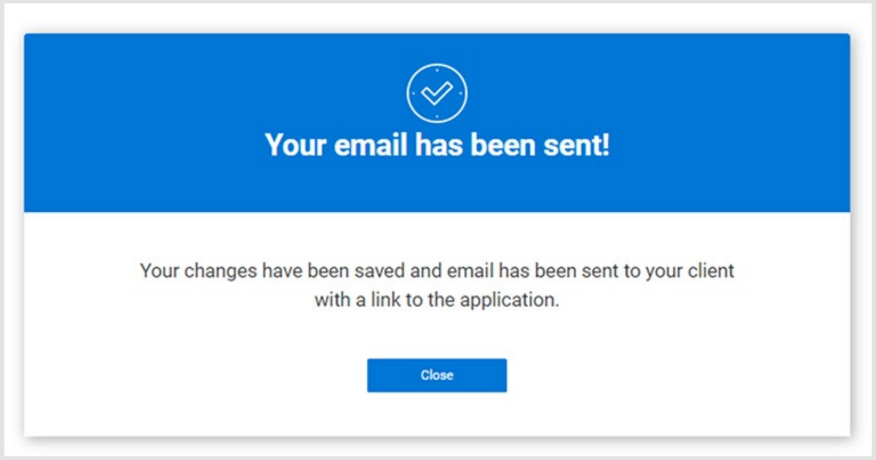

10. Send link to client via email
    a. Click **Send to Client**
    b. Receive confirmation that the email has been sent

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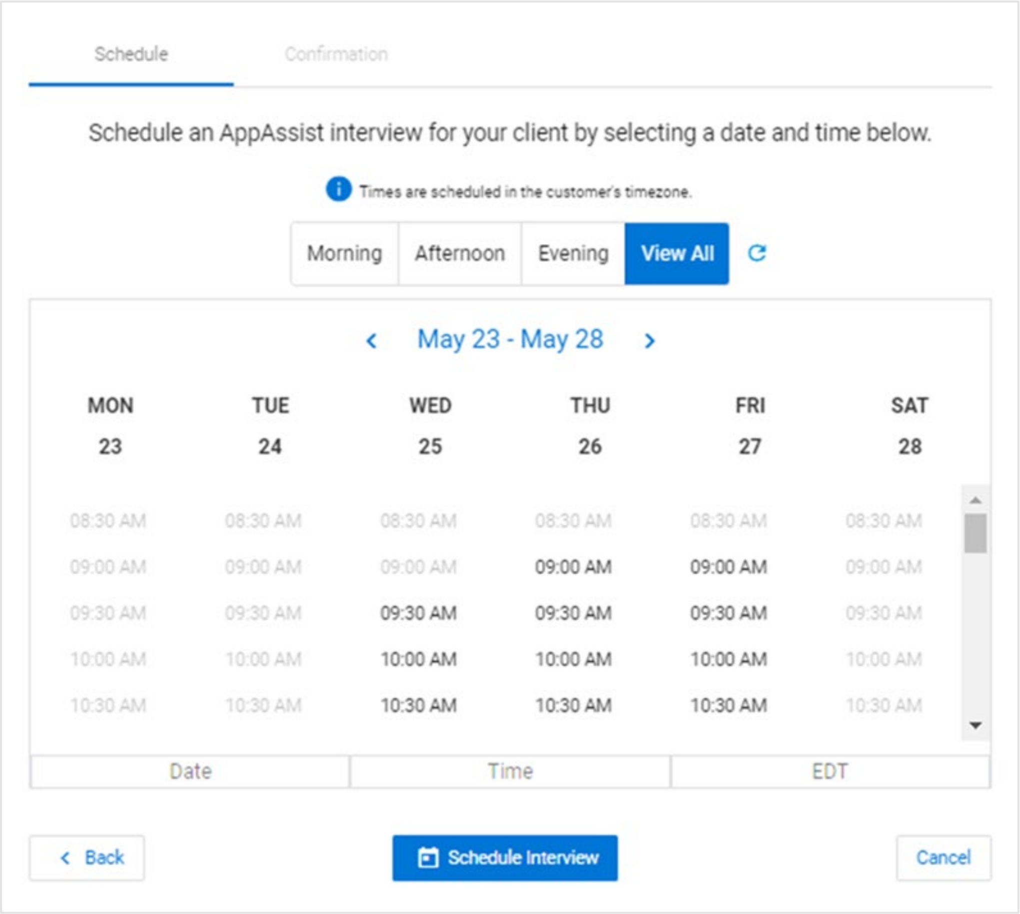

11. Schedule a phone interview
    a. You can schedule a phone interview by selecting a day and time and clicking on the **Schedule** button

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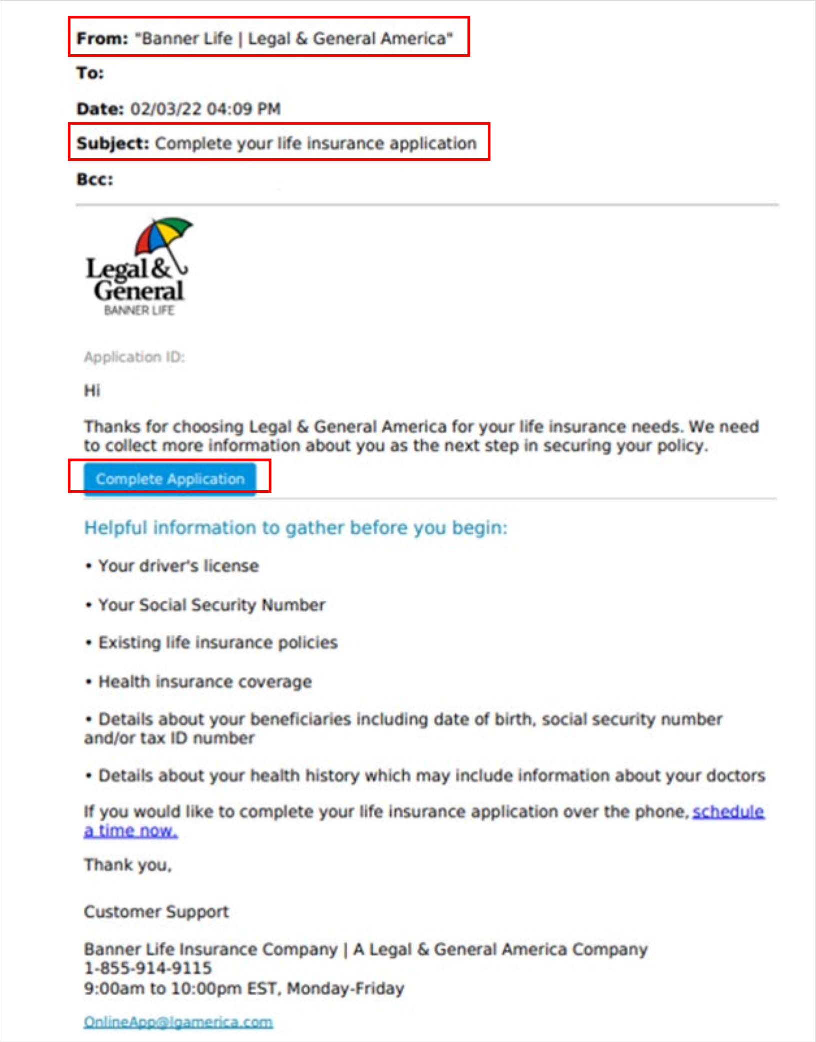

From: "Banner Life | Legal & General America"

To:

Date: 02/03/22 04:09 PM

Subject: Complete your life insurance application

Bcc:

Legal & General
BANNER LIFE

Application ID:

Hi

Thanks for choosing Legal & General America for your life insurance needs. We need to collect more information about you as the next step in securing your policy.

Complete Application

Helpful information to gather before you begin:

- Your driver's license
- Your Social Security Number
- Existing life insurance policies
- Health insurance coverage
- Details about your beneficiaries including date of birth, social security number and/or tax ID number
- Details about your health history which may include information about your doctors

If you would like to complete your life insurance application over the phone, schedule a time now.

Thank you,

Customer Support

Banner Life Insurance Company | A Legal & General America Company
1-855-914-9115
9:00am to 10:00pm EST, Monday-Friday

OnlineApp@lgamerica.com

12. An email will be sent to your client
    a. Sent from:
       ‘Banner Life | Legal & General America’
    b. Subject line: Complete your life insurance application
    c. If a phone interview has been scheduled, the date and time will be included
    d. Client will click on the **Complete Application** link to log into their application
    e. The client can schedule an interview if not already scheduled, they can also reschedule if previously scheduled by clicking on the “**schedule a time now**” link in the email
    f. If your client needs help, our contact information can be found at the bottom of the email

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Legal & General

The process is simple. Your peace of mind, immeasurable.

Thank you for choosing Legal & General America for your life insurance needs. You're on your way to protecting the people who rely on you most.

What happens now?

You should have received an email from us with a link to complete your life insurance application online. The process should only take about twenty minutes.

You will be asked questions about your medical and financial history. This information will only be used for insurance coverage consideration and will be kept confidential in accordance with our privacy policy. Overshare on your application for the smoothest process.

A short medical exam

If necessary, you may receive a call from Banner Life, a Legal & General America company, to schedule a free 30-minute medical exam.

A trained medical examiner will take your height, weight, blood pressure and pulse; collect blood and urine; and possibly conduct an EKG; and/or complete a medical history report.

Helpful documents to have on hand

While completing the online application, it will help if you have some of the following information:

- Driver's license and Social Security numbers
- Names, addresses and phone numbers of doctors, clinics and hospitals visited in past ten years
- Reasons for and dates of medical treatment
- Names of prescription medicines
- Other life insurance policies, including company names, coverage amounts and policy numbers
- Financial information, including income, assets, liabilities and net worth

Exam preparation tips

- Avoid strenuous exercise the day before
- Get a good sleep the night before
- Don't eat solid foods or drink alcohol eight hours before
- Don't use tobacco or drink caffeinated beverages one hour before
- Drink a glass of water one hour before

You'll be protected once your application has been approved and first payment has been received.

Click here to view flyer

13. Share 'What to Expect' flyer with your client
    a. This flyer explains the application process and includes what helpful documents to have on hand and exam prep tips (in case they need an exam)

Legal & General
BANNER LIFE | WILLIAM PENN

Thank you for your business.