

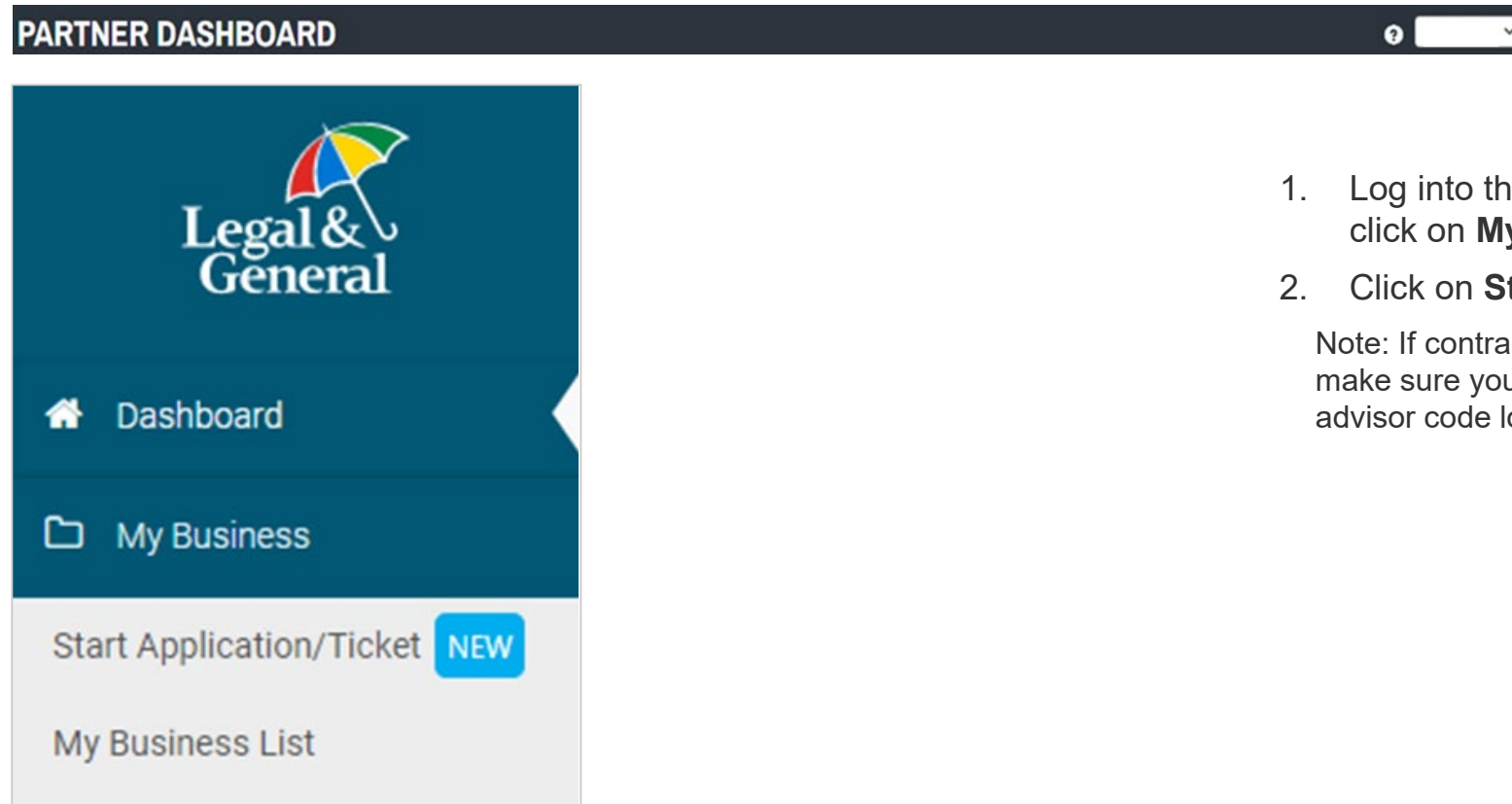


Drop a ticket from Partner Dashboard

Last updated December 2023



Drop a ticket from Partner Dashboard



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



Drop a ticket from Partner Dashboard

The screenshot displays the Legal & General Partner Dashboard. On the left, there is a navigation menu with the following items: Application Information, Your Policy, About You, and Health History. The main content area features a blue header with the text "Start a new application for your client!" and "Our advisor experience gives you the opportunity to guide your client through every step of their life insurance application". Below this, the "Application Information Section" is highlighted, stating "You will need to complete the entire Application Information section before you can 'Save and Exit'". The "Drop a Ticket:" section is also highlighted, explaining that it "Gives you the option to send the application to your client or schedule an AppAssist appointment." The "Digital Application:" section notes that it is "Quick, easy and most advisors are able to complete within 20-30 minutes." A list of "useful client information to have on hand" includes: Client's personal information including last 4 of SSN, Driver's license information, and Medical information. At the bottom, there is a blue "Next" button with a right-pointing arrow.

3. Landing page

- When using the GA link, you will land on this page
- Select **Next**



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Advisor Information

① In order to proceed with this application, advisor must provide either the **advisor code** or the **NPN** and must be licensed in both the insured's and the policy owner's state (if they are different).

GA Code	GA Name	Communication Email [?]
		No email on file

Please enter the below information for each advisor.

Primary Advisor Code [?]	NPN Lookup your NPN	SSN/TID
<input type="text"/>	<input type="text"/>	<input type="text" value="xxx-xx-3343"/>
First Name	Last Name	Split %
<input type="text"/>	<input type="text"/>	<input type="text" value="100.00%"/>

I am not contracted

[+ Add Advisor](#)

Case Notification (Optional)

Email Address

[Next](#) >

[Need Help?](#)

Look up your NPN

The National Producer Number (NPN) is a unique National Association of Insurance Commissioners (NAIC) identifier assigned through the licensing application process. Fill out the information below to look up your NPN.

Last Name

SSN/TID

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**



Drop a ticket from Partner Dashboard

Client Information

Personal information of client is mandatory to get instant decision and SSN is mandatory to complete the ID verification and complete the application.

Please enter any missing information below:

Name
First Name Middle Name (optional) Last Name

Gender **Date of Birth** **Last 4 digits of SSN**

Address
address line 1
address line 2 (optional)

City **State** **Zipcode**

Email Address **Confirm Email Address**

Phone Number **Mobile** **Confirm Phone Number**

Save Age to set effective date based on younger insurance age [More details](#)

Yes
 No

[Next](#) >

[Need Help?](#)

5. Client Information

- Complete all fields
- Select **Next**



Pro Tip

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



Drop a ticket from Partner Dashboard

Policy Information

Details

Product Type [Learn More](#)

OPTerm Coverage Length: 30 Years

Purpose of Insurance: Personal Coverage Amount: \$ 500,000

Underwriting Class: Preferred Table Rating: --Select-- Billing Frequency: Monthly

Term Riders

10 years: \$ 15 years: \$ 20 years: \$

Additional Coverage Details

Child Rider
 \$5,000 \$10,000 Not Interested

Waiver of Premium
 Add Coverage Not Interested

Temporary Insurance Coverage
 Add Coverage Not Interested

Owner

Is the policy owner same as the proposed insured? ?

Yes No

Premium Amount
\$ **39.91**

+ Add Policy

[Next >](#)

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**



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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Policy Information

✔ **Policy 1: OPTerm 30**
Coverage Length 30 Years - Coverage Amount \$800,000 - Estimated Premium \$33.00 monthly

Policy 2: OPTerm 10
Coverage Length 10 Years - Coverage Amount \$250,000

Details

Product Type [Learn More](#)

OPTerm Coverage Length: 10 Years

Purpose of Insurance: Business Coverage Amount: \$ 250,000

Underwriting Class: Preferred Table Rating: --Select-- Billing Frequency: Monthly

Term Riders: 10 years 15 years 20 years

Additional Coverage Details

Child Rider: \$8,000 \$10,000 Not Interested

Waiver of Premium: Add Coverage Not Interested

Temporary Insurance Coverage: Add Coverage Not Interested

This will apply to all policies in this application.

Owner

Is the policy owner same as the proposed insured? Yes No

Is the policy owner an individual or a business? Individual Business

Premium Amount
\$

Remove

➤ Add Policy

Next >

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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Owner

Is the policy owner same as the proposed insured?

Yes No

Is the policy owner an individual or a trust?

Individual Trust

We'll re-verify and update owner details, if they change during the application process.

First Name			Last Name		
<input type="text"/>			<input type="text"/>		
City	State			Zip Code	
<input type="text"/>	-- select--			<input type="text"/>	
Phone Number			Confirm Phone Number		
<input type="text"/>			<input type="text"/>		
Email Address			Confirm Email Address		
<input type="text"/>			<input type="text"/>		

Prem
\$

[+ Add Policy](#)



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



Drop a ticket from Partner Dashboard

Advisor Attestation

We will rely on information provided by you. The answers to the questions you ask and collect from your client will be the basis for us to issue a life insurance policy. The answers provided to us will be made a part of the policy. Every answer you provide to us must be truthful, complete and accurate to the best of your knowledge. As an advisor, your responsibilities include, but are not limited to:

- Ensuring your client does not require a translator.
- Asking all questions exactly as presented, including scenarios where gender specific conditions must be asked to all clients.
- Making us aware of any information that would adversely affect your client's eligibility, acceptability, or insurability.
- Asking your client, the appropriate questions to ensure that the product, with the length and amount of coverage being applied for, is in the best interest of, and suitable for, your client.
- Ensuring you are a licensed life insurance agent in the state where your client lives. If you are not currently appointed, you will get appointed before the policy is finalized.
- Providing complete and accurate information in a timely manner, including all required forms (including any required notices)

By clicking the blue button below, you agree that:

You will work with your client to ensure that accurate and honest information is provided. You understand that if the wrong information is received, your client could miss out on coverage benefits.

You authorize Legal & General America to obtain any necessary administrative information order to complete this life insurance application. You understand that any information needed from your client requiring action and/or advice from a licensed life insurance agent will be referred to you for before the application can be completed.

I Agree >

Need Help?

Legal & General America life insurance products are underwritten and issued by Banner Life Insurance Company, Urbana, MD and William Penn Life Insurance Company of New York, Valley Stream, NY. Banner products are distributed in 49 states and D.C. William Penn products are available exclusively in New York; Banner does not solicit business there. The Legal & General America companies are part of the worldwide Legal & General Group. 19-094

Application Reference #: 1000008361
Policy #: 5100083172, 5100083173



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7. Advisor Attestation

- 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



Drop a ticket from Partner Dashboard

Application for
You can complete the entire application with your client, send it to the client to complete, or schedule an AppAssist Interview.

Continue along with your client


Use our quick and easy application – most advisors complete it within 30 minutes. Remember, your client must agree to our HIPAA authorization before starting the 'Health History' section.

[Continue Digital Application](#)

Give your client the control

This gives you the option to send the application to your client to complete independently or schedule a time for your client to complete their app over the phone with our AppAssist team.

[Send To Client Or Schedule Interview](#)

 Need Help?

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

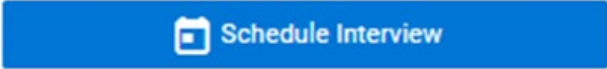


Drop a ticket from Partner Dashboard

Select Application Method ✕

You have two options when dropping a ticket. You can either schedule an interview with one of our AppAssist agents or you can send the digital application to your client via an email link.

 Send to Client

 Schedule Interview

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




Drop a ticket from Partner Dashboard

Send to Client ✕

Are you sure you want to send the digital application to your client via email link? Once they receive the link they will be able to complete it on their own.

[← Back](#) [➤ Send to Client](#) [Cancel](#)


Your email has been sent!

Your changes have been saved and email has been sent to your client with a link to the application.

[Close](#)

10. Send link to client via email

- Click **Send to Client**
- Receive confirmation that the email has been sent



Drop a ticket from Partner Dashboard

Schedule Confirmation

Schedule an AppAssist interview for your client by selecting a date and time below.

Times are scheduled in the customer's timezone.

Morning Afternoon Evening **View All**

< May 23 - May 28 >

MON	TUE	WED	THU	FRI	SAT
23	24	25	26	27	28
08:30 AM	08:30 AM	08:30 AM	08:30 AM	08:30 AM	08:30 AM
09:00 AM	09:00 AM	09:00 AM	09:00 AM	09:00 AM	09:00 AM
09:30 AM	09:30 AM	09:30 AM	09:30 AM	09:30 AM	09:30 AM
10:00 AM	10:00 AM	10:00 AM	10:00 AM	10:00 AM	10:00 AM
10:30 AM	10:30 AM	10:30 AM	10:30 AM	10:30 AM	10:30 AM
Date	Time	EDT			

< Back **Schedule Interview** Cancel


11. Schedule a phone interview

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

Drop a ticket from Partner Dashboard



From: "Banner Life | Legal & General America"
To:
Date: 02/03/22 04:09 PM
Subject: Complete your life insurance application
Bcc:



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

- Sent from:
'Banner Life | Legal & General America'
- Subject line: Complete your life insurance application
- If a phone interview has been scheduled, the date and time will be included
- Client will click on the **Complete Application** link to log into their application
- 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
- If your client needs help, our contact information can be found at the bottom of the email

Drop a ticket from Partner Dashboard






**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.

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

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



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)

Thank you for your business.

