Set Agency & Digital Application Preferences

Last updated June 2022

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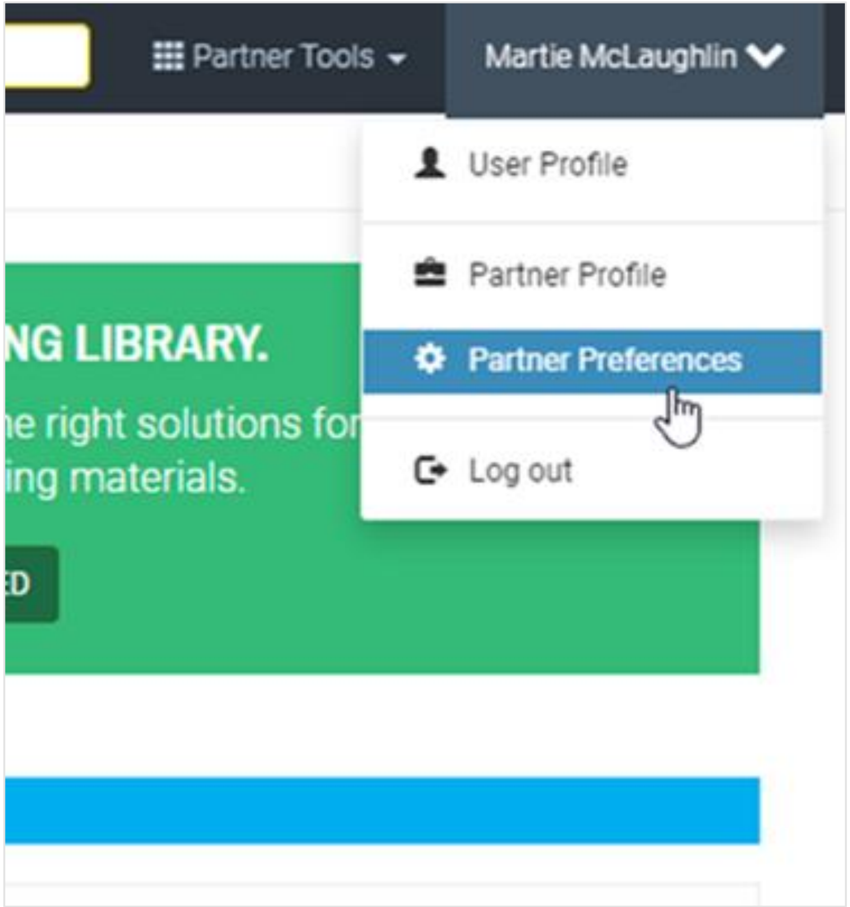
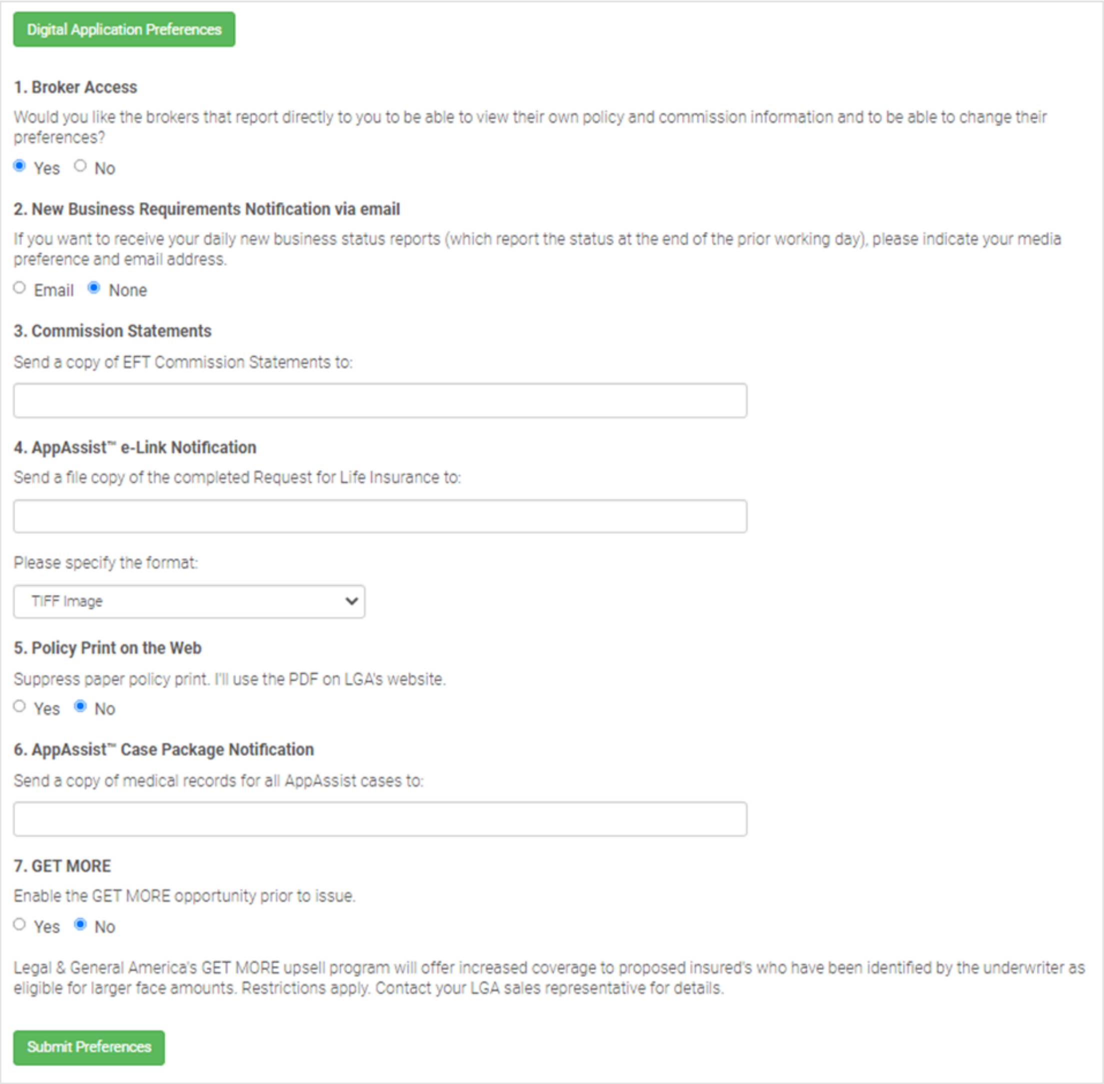


1. Select the arrow next to name in upper right corner
2. Click on **Partner Preferences**

Set Agency & Digital Application Preferences



Digital Application Preferences

1. Broker Access

Would you like the brokers that report directly to you to be able to view their own policy and commission information and to be able to change their preferences?

(•) Yes ( ) No

2. New Business Requirements Notification via email

If you want to receive your daily new business status reports (which report the status at the end of the prior working day), please indicate your media preference and email address.

( ) Email (•) None

3. Commission Statements

Send a copy of EFT Commission Statements to:

4. AppAssist™ e-Link Notification

Send a file copy of the completed Request for Life Insurance to:

Please specify the format:

TIFF Image

5. Policy Print on the Web

Suppress paper policy print. I'll use the PDF on LGA's website.

( ) Yes (•) No

6. AppAssist™ Case Package Notification

Send a copy of medical records for all AppAssist cases to:

7. GET MORE

Enable the GET MORE opportunity prior to issue.

( ) Yes (•) No

Legal & General America's GET MORE upsell program will offer increased coverage to proposed insured's who have been identified by the underwriter as eligible for larger face amounts. Restrictions apply. Contact your LGA sales representative for details.

Submit Preferences

3. Set preferences on the main screen
   a. Make sure Broker Access is set to **Yes**
   b. This gives your downline access to their pending and inforce business as well as the ability to drop a ticket or complete a digital application from the Partner Dashboard
   c. Click **Submit Preferences**
4. Set Digital Application Preferences by clicking on the **green button** at the top of the screen

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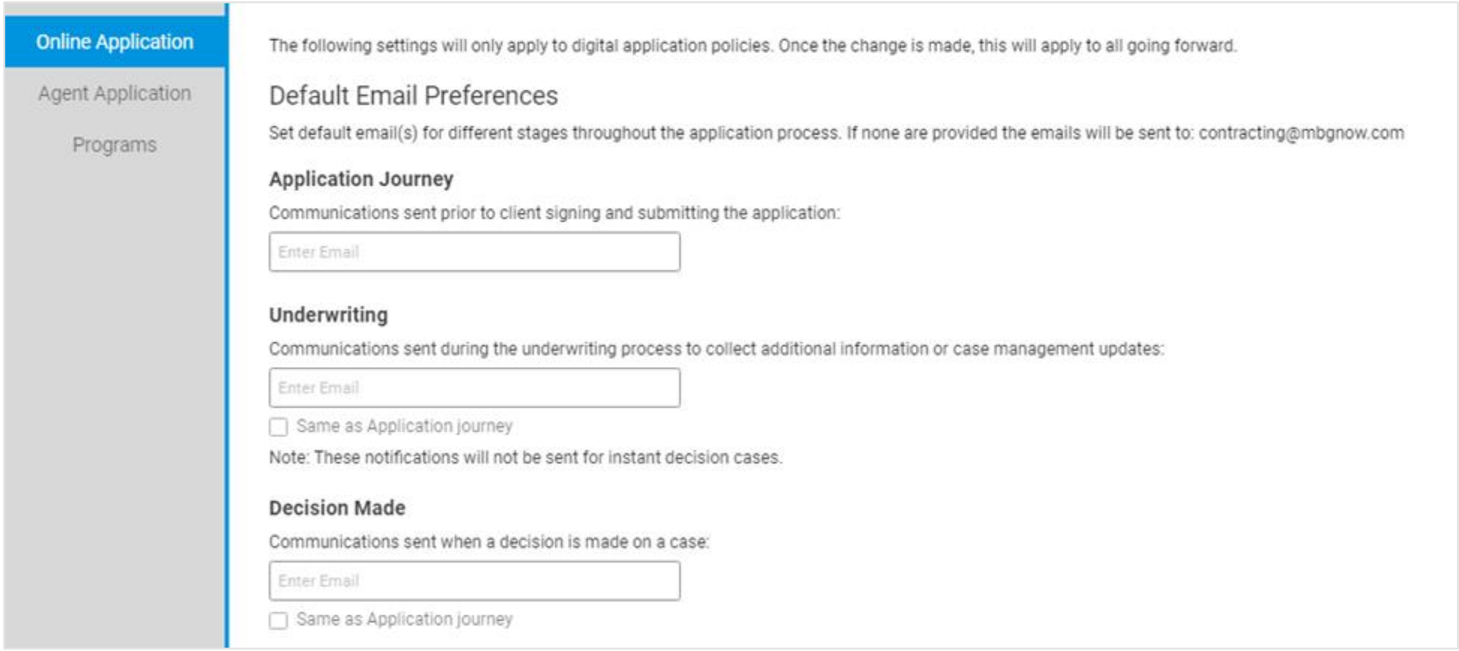

5. Enter the email address for each field

   Note: up to 10 email addresses are allowed but everyone will receive the same emails

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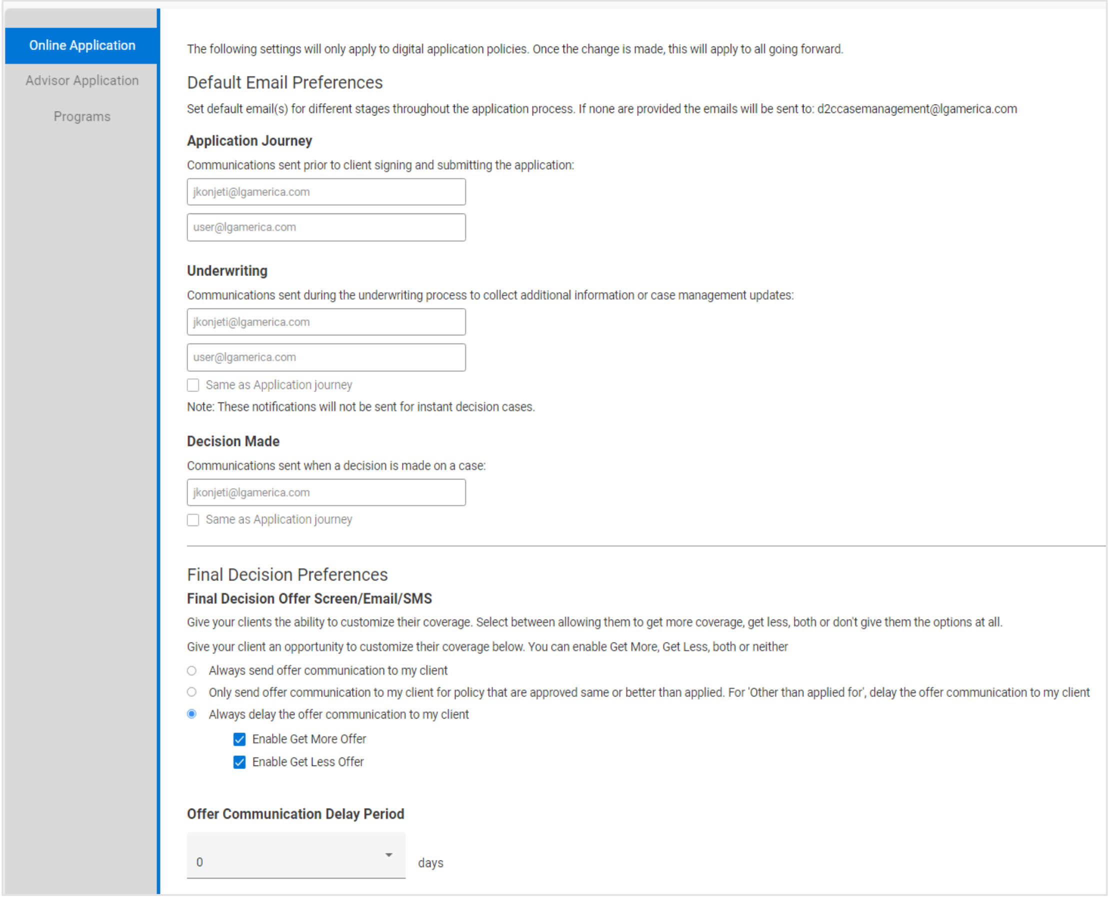
Legal & General
BANNER LIFE | WILLIAM PENN



Online Application
Advisor Application
Programs

The following settings will only apply to digital application policies. Once the change is made, this will apply to all going forward.

Default Email Preferences

Set default email(s) for different stages throughout the application process. If none are provided the emails will be sent to: d2ccasemanagement@lgamerica.com

Application Journey

Communications sent prior to client signing and submitting the application:

jkonjeti@lgamerica.com

user@lgamerica.com

Underwriting

Communications sent during the underwriting process to collect additional information or case management updates:

jkonjeti@lgamerica.com

user@lgamerica.com

☐ Same as Application journey

Note: These notifications will not be sent for instant decision cases.

Decision Made

Communications sent when a decision is made on a case:

jkonjeti@lgamerica.com

☐ Same as Application journey

Final Decision Preferences

Final Decision Offer Screen/Email/SMS

Give your clients the ability to customize their coverage. Select between allowing them to get more coverage, get less, both or don't give them the options at all.

Give your client an opportunity to customize their coverage below. You can enable Get More, Get Less, both or neither

○ Always send offer communication to my client

○ Only send offer communication to my client for policy that are approved same or better than applied. For 'Other than applied for', delay the offer communication to my client

◉ Always delay the offer communication to my client

☑ Enable Get More Offer

☑ Enable Get Less Offer

Offer Communication Delay Period

0 days

6. You can decide when the offer is sent to the client and whether they can customize their coverage
   - Option 1: Offer is sent to client and GA simultaneously
   - Option 2: Offer is sent to client when approved as applied for or better; offer is sent to GA to when approved worse than applied for and offer to client is delayed up to 5 business days
   - Option 3: All offers are sent to GA; offer to client is delayed up to 5 business days
   - All 3 options allows GA to enable the Get More and/or Get Less at the client level
7. Click on Submit Changes in the upper right corner

Advisor Application Preference

Online Application

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Programs

Advisor Application Preferences

The following settings will only apply to digital application policies. Once the change is made, this will apply to all going forward.

Advisor Journey

The default method of completing the application is to continue digitally through our Advisor-Assisted Application. Please select a secondary method to apply if you are unable to complete the application with your client:

- ○ Send a link to your client via email
  This will allow your client to complete their application on their own.
- ○ Schedule a time for your client to complete the application over the phone + email a link
  - Your client can complete their application over the phone with our AppAssist team.
  - We will also send them a link to the application which they can start ahead of their scheduled time. If you chose this option, you will also be able to send your client a link to complete the application on their own without an interview, according to your preference for each individual client.

Program Preferences

Online Application

Advisor Application

Programs

Lab Lift Program

For clients who do not qualify for accelerated underwriting within the digital application platform, Lab Lift is another path to an exam-free experience.

To be eligible, the applicant must meet the following criteria:

- Ages 20 - 60
- Physical within the last 18 months that includes complete blood work
- Total face amount(s) cannot exceed $2 million

Opt-out

All agencies are automatically opted-in to the Lab Lift Program, however if your agency prefers to no longer participate, just select 'Yes' in the Opt-out below. If your agency would like to participate in the program again, it's as easy as changing the 'Yes' to 'No' in the Opt-out below.

- (●) Yes, please opt-out my agency
- ( ) No, my agency wants to participate

Age Range

Your agency has selected the age range below for this program.

Minimum Age	Maximum Age
20	60

For more information, please contact your business development manager