Legal & General
BANNER LIFE | WILLIAM PENN

Introducing the new **Applicant Portal**

A simplified, centralized way for applicants to track their application.

What's new?

A modernized, self-service applicant experience

- One centralized portal for applicants to view and track their application.
- No more separate links sent for every document or requirement.
- Applicants can:
    - View policy status
    - Complete outstanding actions
    - Update personal and application details
    - Track progress through the entire application journey

Key benefits

For applicants:

- Clear timeline and visibility into application status
- Less confusion, one link
- Faster response time to complete tasks

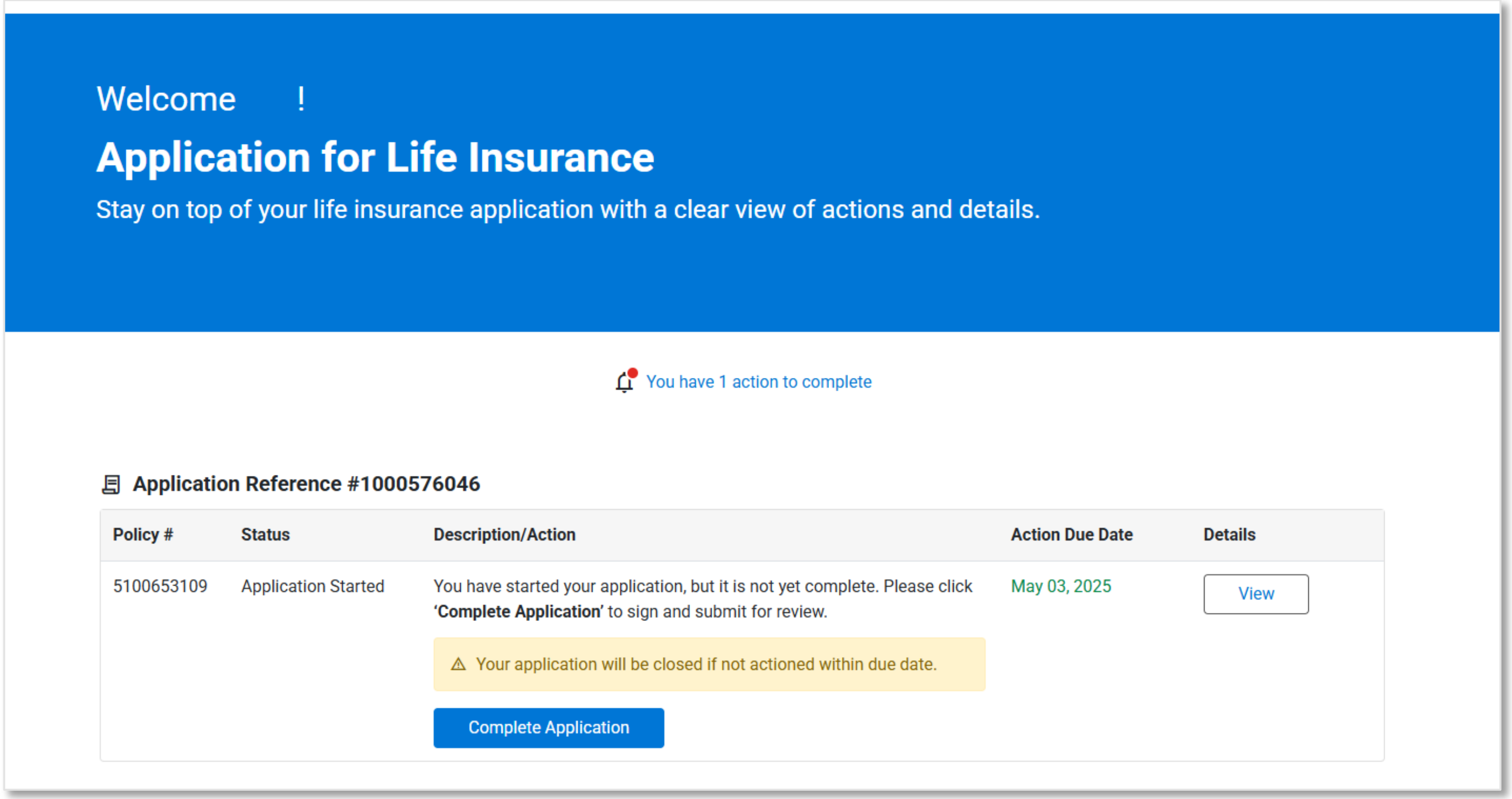
For you:

- Fewer follow-up calls and support requests
- Improved client experience
- More efficient case management

Portal overview

Homepage view

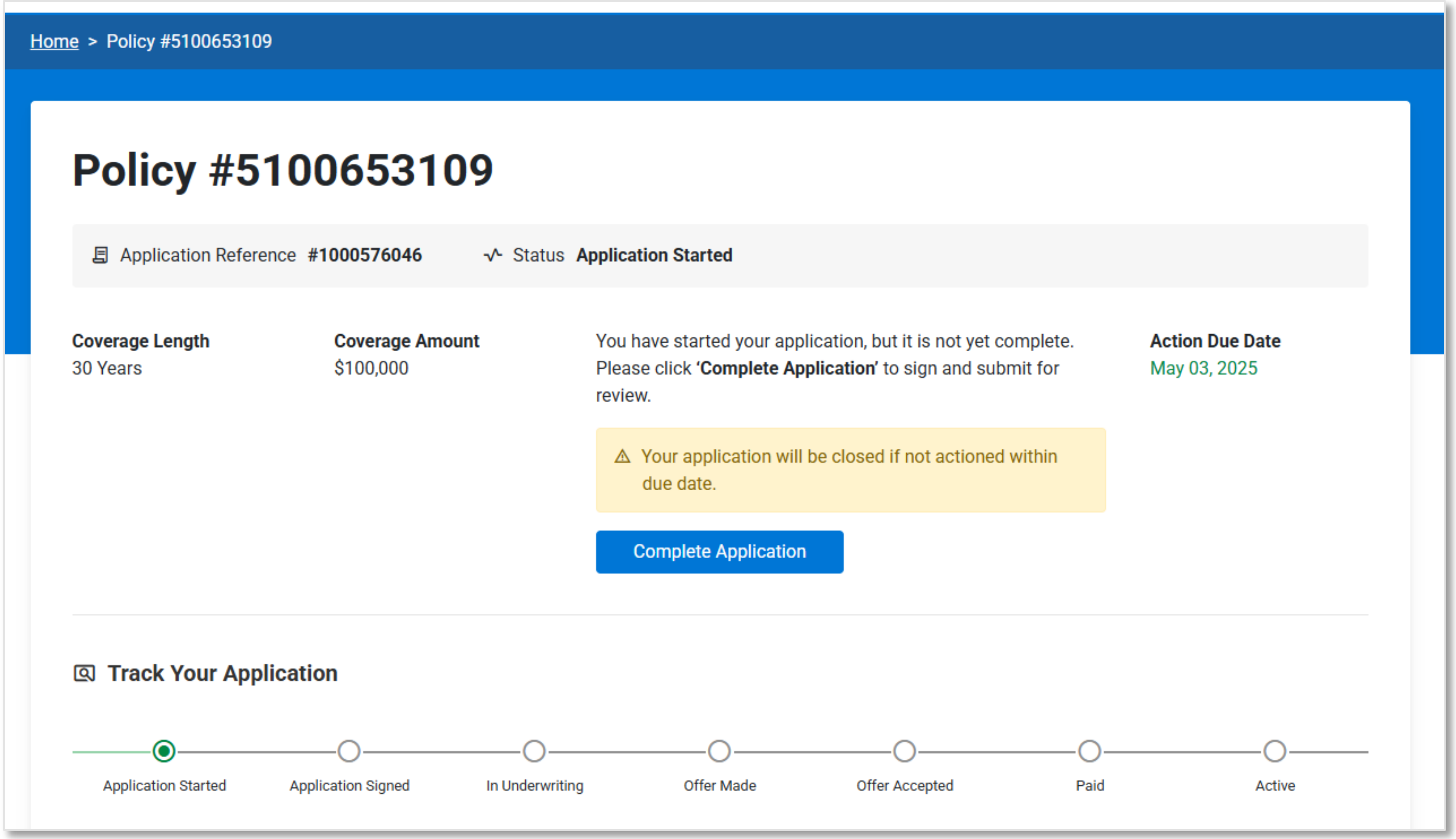
- Welcome message and application reference number
- Visual cue of how many actions are needed
- Clear next step: **"Complete Application"**
- Application due date is displayed
- Status clearly marked (e.g., "Application Started")



Policy overview page

Policy snapshot

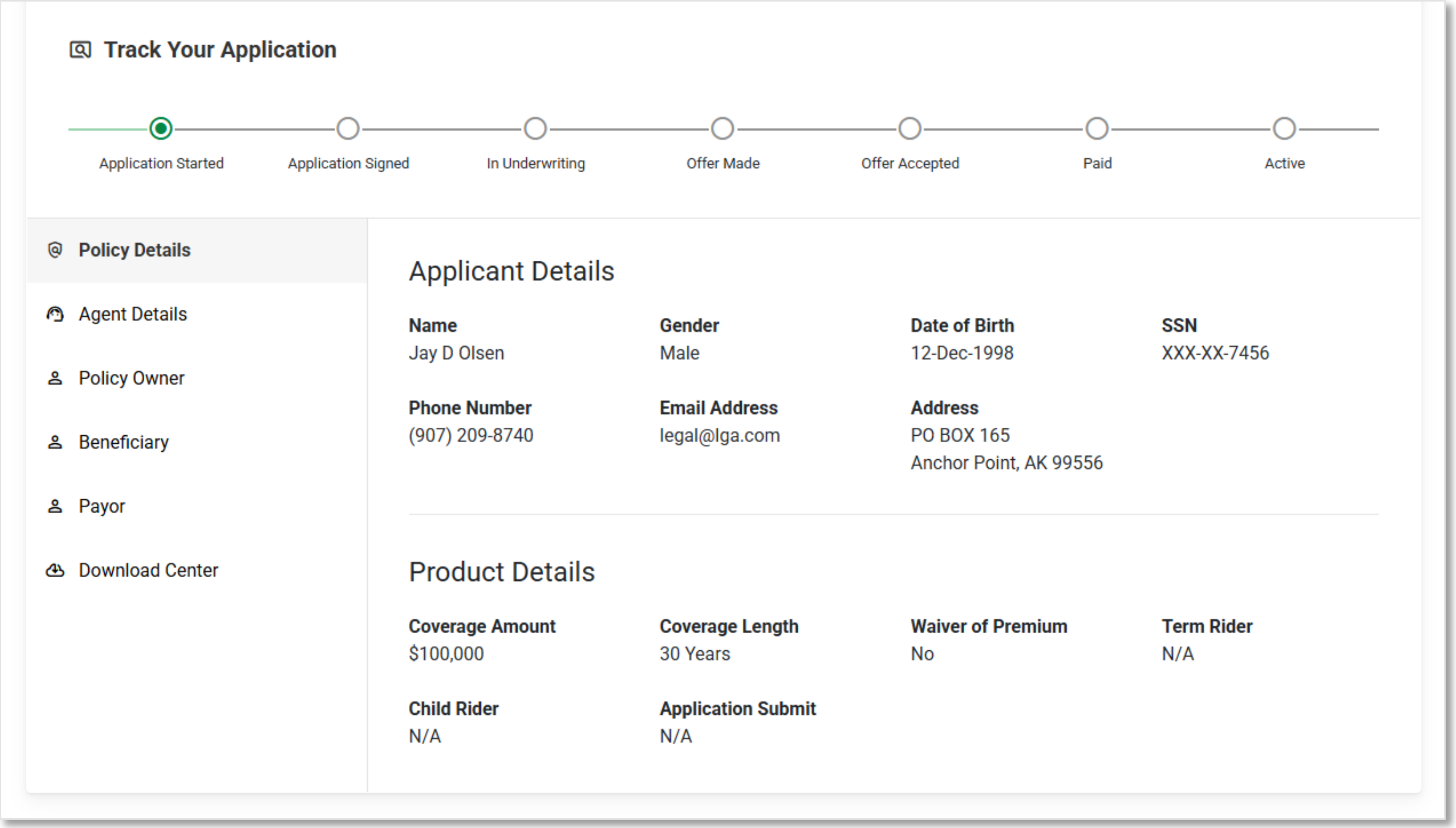
- Policy number, coverage amount and term length shown at the top
- Action required banner for easy next steps
- Visual tracker shows progress (Application Started to Active)



Details breakdown

Personal and product information

- Quick access to:
  - Application details (DOB, address, contact info)
  - Product details (coverage length, riders, waiver or premium)
  - Policy owner, agent info, beneficiaries
- Trackable progress bar gives transparency to every stage



Applicant tasks

What applicants can do themselves

- Upload missing documents
- Complete and e-sign application
- View any outstanding requirements
- Update contact information before submission

How it **works**

New workflow

- Applicant receives portal link at application start
- Single centralized link — portal is the home for all updates
- Reminders prompt return to portal, not separate emails
- Once complete, application moves to next phase automatically

Frequently asked questions

Q: Can the applicant still call or email support?

A: Yes, support remains available, but the portal reduces the need.

Q: Will advisors have visibility?

A: Advisors still receive updates via traditional channels and can prompt clients to log in.

Q: What happens if the portal isn’t accessed?

A: Applications will not be impacted. The Applicant Portal is simply to help provide transparency and ease of access during the application process.

Tips for advisors

- Encourage applicants to bookmark the portal
- Let clients know this simplifies the process
- Offer to walk them through it if needed – most find it intuitive

Note: Reach out to our team for a step-by-step guide

Questions?

Visit our Contact Directory to connect with your dedicated your team. From quick answers to in-depth training, we’re here to support you.

Get connected