

THE E-POLICY DELIVERY PROCESS



OPT-IN

Agency is opted-in to e-Policy delivery.



FULFILLMENT CENTER

The client works with a fulfillment center to complete part 1 & part 2 over the phone; signs the application via voice-signature or DocuSign®, and opts-in for e-policy delivery.



EMAIL SENT

Once the policy is approved and issued, an email is automatically sent (within 24 hours) to the client with instructions on how to register for an SBLI account and access their policy documents.



ALERT NOTIFICATION

The agency / agent is simultaneously sent an alert notification that the policy has been approved and issued.



POLICY DELIVERY

The policy and all delivery requirements can be accepted, signed, and paid for online by the client with coverage beginning as of the policy date.

E-POLICY DELIVERY PROGRAM

An integral part of SBLI's end-to-end digital process

SBLI[®]

POLICIES ELIGIBLE FOR E-POLICY DELIVERY

- ✓ Proposed insured, policy owner, and payer are the same.
- ✓ It is not a conversion policy.
- ✓ Proposed Insured has not declined e-Policy delivery.
- ✓ The acceptable outstanding delivery requirements are initial premium payment, Good Health Statement, delivery receipt, and applicable amendment.

KEY FEATURES

EASY

- No face-to-face contact necessary
- No action required by agency or agent

SIMPLE

- Email to client has customer-friendly, easy-to-follow instructions
- Policy and delivery requirements can be accepted, signed and paid for by the client online.

CONVENIENT

- Improved placement
- Faster commissions

If you'd like your agency to be set up, or if you need any additional information or training on our e-Policy delivery program and process, please contact our Brokerage Sales Desk at 1-888-224-7254 (option 1) or email brokerage@sbli.com for assistance.