

iPipeline® Tools for AG Quick Ticket Processing





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Spend more time taking care of customers and less time filling out applications with AG Quick Ticket[®] and iPipeline tools

iPipeline tools save time by directly integrating the AG Quick Ticket process into their multicarrier quote engine, LifePipe. No matter how you access AG Quick Ticket, quicker submission means quicker commission.

Once submitted through any of iPipeline's tools, the process is the same as our current AG Quick Ticket procedure. Application information is electronically transferred to ExamOne and continues via the routine AG Quick Ticket process.

Special feature now available to iPipeline users:

Other owners (as constituted by a person other than the insured, a trust or a corporation) are permitted for AG Quick Ticket sales submitted through iPipeline.



Getting started: Field underwriting

- American General Life's underwriting guidelines can help determine the rate class and premium for the desired product.
 Please refer to the Field Underwriting Guide.
- American General Life has six underwriting classes: Preferred Plus, Preferred Non-Tobacco, Standard Plus, Standard Non-Tobacco, Preferred Tobacco and Standard Tobacco.
- The agent should not collect premium. If the client wishes to pay via bank draft, the examiner will collect the client's bank account information.
- If the proposed insured indicates that a current life insurance policy will be replaced, AG Quick Ticket will create the application packet and replacement forms in all states except New York due to complex replacement form requirements. Applications for replacements in New York will need to be substituted via a traditional submission method.

Creating a ticket in iPipeline

You can start from any of these iPipeline tools:

- LifePipe
- FormsPipe
- iGO e-App*
- If you do not already have an account you must register for iGO e-APP through your general agency
- From LifePipe or FormsPipe click
 e-App
- 2 From iGO e-APP click "Start New Case" to build a ticket or "View My Cases" to pull up an existing ticket.

Product Selection:

- Complete the state (solicitation state where the forms will be signed), product type and case information.
- Replacements can be submitted through AG Quick Ticket in all states except New York. For New York, replacements must be submitted via a traditional process.

	Compare Ch	ecked Edit Quot	e Details Email Quote	Print Quote		
Term Quote Information	n					
Name	Age/Nearest	Gender	State	Amount		Health Class(es)
Insured Name	34/34	Male	PA	\$500,000	Pr	referred Non-Tobacco
All Quote Results						
Compare C	arrier Product				Action	Total Premium (Annual)
20 Year - \$500,000						
AIG. American General	>AlG Select-A-Term (Preferred Nontob ▶Product Disclosur Nearest Age 34 NOTE: Rates Effe	i (20 yrs) acco) £ ctive 7/25/07		1	Paper Forms	\$400.00



Start New Case						Case Ad	tions
			Case	nformation			
Status Started	Date Modified 08/02/2017						
Proposed Insured							
First Name				Last Name			
Ted				Rose			
Date of Birth	Age	G	ender				
Date of Birth	Age 36	G	ender Male	•			
Date of Birth 11 / 12 / 1980 Case Description Examples: \$500,000.00 Carrier and Produ	Age 36 D, Kid's Policy, Busines	s Policy, etc)	ender Male	•			
Date of Birth 11 / 12 / 1980 Case Description Examples: \$500,000.0 Carrier and Produ State:	Age 36 D, Kid's Policy, Busines	G S Policy, etc)	ender Male roduct Type				
Date of Birth 11 / 12 / 1980 Case Description Examples: \$500,000,0 Carrier and Produ State: Texas	Age 36 0, Kid's Policy, Busines	s Policy, etc)	ender Male roduct Type Universal Life		Fine	d Available Product	5
Date of Birth 11 / 12 / 1980 Case Description Examples: \$500,000.0 Carrier and Produ State: Texas Product	Age 36 0, Kid's Policy, Busines ct	s Policy, etc)	ender Male roduct Type Universal Life		Fino	l Avsilable Product	s
Date of Birth 11 / 12 / 1980 Case Description Examples: \$500,000,00 Carrier and Produ State: Texas Product Carrier_	Age 36 0, Kid's Policy, Busines ct	s Policy, etc)	ender Male Toduct Type Universal Life	•	Fine	1 Available Product	S



• Complete basic client information and the client income information.

AIG			My Ca	ses Nee	d Assistance? 👻	Welcome 👻
Rose, Ted American General Life Companies - All states except NY (AGL)	AG Secure Lifetime GUL 3		🖺 Save 🖉 Vie	w Forms	Case Actions	•
	Case Inform	nation A	G Quick Ticket			
? Proposed Insured						
Plan of Insurance	Proposed Insur	ed				
Riders and Benefits	Personal Details					
Beneficiary						
Existing Insurance	First Name	M.I.	Last Name		Suffix	
Premium Information	Ted	470	Rose	Condor		•
Agent Report	11 / 12 / 1980	36	Social Security Number	Male	Female	
Attachment						
Validation and Lock Dat	Contact Information					
	Address 1					
	City		State		Zip Code	
	Home Phone	Mobile Phone	Work Phone			
	Would the signers (insured/ov	wner) of this applicat	ion like to electronically sign?			
	Email Address					
	Income Information					

Plan of Insurance:

• Complete the rate class, face amount and the reason for insurance

AIG		My Cases Need Assistance? 🗸 Welcome 🗸
Rose, Ted American General Life Companies - All states except NY (AGL)	AG Secure Lifetime GUL 3	Save View Forms Case Actions
	Case Information AG Quic	k Ticket
Proposed Insured		
? Plan of Insurance	Plan of Insurance	
Riders and Benefits	Product Name: AG Secure Lifetime GUL 3	Application State: TX
Beneficiary	Rate Class Quoted	
Existing Insurance		
Premium Information	Face Amount \$	
Agent Report	Death Benefit Option	
Attachment		
Validation and Lock Dat	Death Benefit Compliance Test	
	Reason for Insurance	
	Personal O Business	
	Is the proposed insured applying for additional insurance	?
	K Back Next >	

Riders and Benefits:

• Complete any rider or benefit information.

Beneficiaries:

• Enter the beneficiary information

Existing Insurance:

• Enter any existing insurance information

AIG		My Cases Need Assistance? - Welcome -
Rose, Ted American General Life Companies - All states except NY (AGL)	AG Secure Lifetime GUL 3	Save Diview Forms Case Actions
	Case Information	AG Quick Ticket
✓ Proposed Insured		
✓ Plan of Insurance	Riders and Benefits	
✓ Riders and Benefits		
Beneficiary	Waiver of Monthly Deduction	
Existing Insurance	Accidental Death Benefit	
Premium Information		
Agent Report	Child Rider	
Attachment		
Validation and Lock Dat	Terminal Illness Rider	

AIG			My Cases	Need Assistance? +	Welcome 👻
Rose, Ted American General Life Companies - All states except NY (AGL)	AG Secure Lifetime GUL 3	Sar	ve 🔀 View Fo	Case Actions	•
	Case Information	AG Quick Ticket			
✓ Proposed Insured					
Y Plan of Insurance	Beneficiary				
✓ Riders and Benefits	Divide the percentage equally among	all Primary Beneficiaries?			
✓ Beneficiary	Please enter your Primary Bene	ficiaries by clicking on the grid b	elow. Up to 9	may be entered.	
Existing Insurance	Name	Beneficiary Type	Share	%	
Premium Information	Many Pose	Individual	100		
Agent Report	Wary Nose	mawadai	100		Edit
Attachment		Click here to add			
Validation and Lock Dat	Would you like to designate a contin	gent beneficiary?			
	Kext >				

A	IG						
Rose, Amer state:	Ted ican General Life Companies - All s except NY (AGL)	AG Secure Lifetime GUL 3		Si Si	ave 🔀 View Fo	rms Case Actio	ons 💌
		Case Info	ormation	AG Quick Ticket			
~	Proposed Insured		The second second				
~	Plan of Insurance	Existing Insur	ance				
~	Riders and Benefits	Do any of the Proposed In any application pending for	sureds have any	y existing annuity, life insurance with this Company or any ot	e, or disability in her company?	surance or have	
~	Beneficiary	Yes No					
?	Existing Insurance	Are you considering disco	ntinuing making	g premium payments, surrend	ering, forfeiting, a	ssigning to the	
	Premium Information	© Yes ⊚ No	inaung your exi	isting policy of contract?			
	Agent Report	Are you considering using	funds from you	r existing policies or contracts	to pay premium	s due on the	
	Attachment	new policy or contract?					
	Validation and Lock Dat						
		Existing Insurance Info	rmation				
		Company Name	e	Policy Number	Replace	ment	
		ABC Company		2156231216	Ye	5	🕼 Edit
				Click here to add.	•		
		Reason for Replacement					
		If this is an internal/a 1-800-515-5375	ffiliate replacem	ent you will need to complete f	orm AGLC105894	and fax to AIG Life II	nsurance at
		Sales Materials used. Atta used. If no sales materials	ch any sales ma were used, ind	terials used. (List form numbe icate "None")	r and brief descr	ption or name of sa	les materials

Payment Information:

 Enter the method of payment, the modal amount and the payment frequency.
 If the client is applying for our GUL product, additional premium can be added to the initial modal premium.

Agent Report:

• Complete the agent information and questions

AIG				My Cases	Need Assistance? 👻	Welcome 👻
Rose, Ted American General Life Companies - All states except NY (AGL)	AG Secure Lifetime GUL 3		Save 2	Diew Fo	Case Actions	•
	Case Infor	mation AG	Quick Ticket			
 Proposed Insured 						
✓ Plan of Insurance	Premium Infor	mation				
✓ Riders and Benefits	O NOT submit premiu	ım/ cash. Carrier cannot	accept premium money	until paperwo	rk is signed and receive	d by the
V Beneficiary	carrier home office.					
 Existing Insurance 						
? Premium Information	Payor must be the insu	red or Owner				
Agent Report	Doumont Mothod	Daymont Fraguence				
Attachment	Payment Method	, Payment Frequency	· •			
Validation and Lock Dat	Modal Premium \$	Additional Initial Pro	emium \$			
	Would the insured like to sa	ve age?				
	< Back	Next >				

AIG			My Cases	Need Assistance? - Welcome -
Rose, Ted American General Life Companies - All AG states except NY (AGL)	Secure Lifetime GUL 3		Save Diew F	orms Case Actions
	Case Informa	ation AG Quic	k Ticket	
✓ Proposed Insured				
✓ Plan of Insurance	Agent Report			
✓ Riders and Benefits	Writing Agent Information			
✓ Beneficiary	First Name	M.I. Last	Name	Suffix
✓ Existing Insurance	Course in the design of the second		_	
✓ Premium Information		Phone Numbe		
? Agent Report	Agency Code #	Agent Code #	Commission %	
Attachment			100	
Validation and Lock Dat	Is there to be any split commis	sion with another agent?		
	Yes No Are you aware of any other infieligibility, acceptability, or insurved in the primary Proposed Insurved Ins	ormation that would advers irability? sured have any existing or p eing submitted? ide the name of a physician e and address.	sely affect the Primary Propose bending annuities or life insura or health care provider to be	ed Insured's ance policies? copied in the event of abnormal HIV

Attachment:

• If a document needs to be uploaded attach here.

AIG			My Cases	Need Assistance? 👻	Welcome 👻
Rose, Ted American General Life Companies - All AG states except NY (AGL)	Secure Lifetime GUL 3	Save	Diew For	rms Case Actions	•
	Case Information	AG Quick Ticket			
 Proposed Insured 					
✓ Plan of Insurance	Attachment				
✓ Riders and Benefits	Please click the Upload Attachment button The attached PDF should be under 15 MB.	to submit a PDF with this LifeTick	et.		
✓ Beneficiary					
 Existing Insurance 	Upload Attachment				
✓ Premium Information	K Back Next >				
✓ Agent Report					
🖌 Attachment					
Validation and Lock Dat					

Lock Ticket:

 If all information has been entered click
 Lock Ticket to proceed to submission

AIG			My Cases	Need Assistance? 👻	Welcome 👻
Rose, Ted American General Life Companies - All states except NY (AGL)	AG Secure Lifetime GUL 3	Save	L View Fo	Case Actions	•
	Case Information	AG Quick Ticket			
✓ Proposed Insured					
✓ Plan of Insurance	Validate and Lock Data				
✓ Riders and Benefits	Congratulations your ticket is ready for sull	bmission.			
✓ Beneficiary					
 Existing Insurance 	Please click the "Lock Ticket" button below				
✓ Premium Information	Lock Ticket and proceed 1	to submission			
✓ Agent Report					
✓ Attachment	< Back				
? Validation and Lock Dat					

 Once the information has been locked click
 Next to proceed to the agent attestation. Or click Unlock Ticket
 Data if information needs to be edited.

Agree to Terms:

• Agree to the terms by checking the **"I Agree"** check box. Once the check box has checked the Submit button becomes available to route the ticket to case manager.

A	IG	My Cases Need Assistance? • Welcome •
Rose Ame state	e, Ted rican General Life Companies - All es except NY (AGL)	AG Secure Lifetime GUL 3 Case Actions
		Case Information AG Quick Ticket
	Proposed Insured	
	Plan of Insurance	Application Locked
	Riders and Benefits	S The ticket has been locked!
	Beneficiary	
	Existing Insurance	You are almost depail the Applicant piece has now been completed and all that is left in the attestation then the ticket will be ready
	Premium Information	to submit, if changes need to be made to the applicant's information then the ticket can be unlocked by clicket will be ready to submit. If changes need to be made to the applicant's information then the ticket can be unlocked by clicket
	Agent Report	tree to Lock and continue on to the agent attestation.
	Attachment	Unlock Ticket Data.
~	Validation and Lock Dat	
0	Agent Attestations	NEX

AIG	My Cases Need Assistance? • Welcome •								
Rose, Ted American General Life Companies - All states except NY (AGL)	د G Secure Lifetime GUL 3 دو Actions دو که د								
	Case Information AG Quick Ticket								
Proposed Insured									
Plan of Insurance	Agent Attestations								
Riders and Benefits	* By checking the LAGREE checkbox below, I state the following:								
Beneficiary									
Existing Insurance	(a) the plan and mount or insurance identified is suitable in view of the purpert,								
Premium Information	 (a) the particular amount of instance for matter is statute in text of the owners instance needs and instance to be accurate and correctly recorded, and (b) the information provided is complete, accurate and correctly recorded, and (c) the particular formation provided is the applicant 								
Agent Report	(4) an required forms have been provided to the applicant.								
Attachment	"I authorize the American General Life Companies furnilment center representative to obtain such administrative information as may be necessary to complete any life insurance resulting from this lead submission, provided, however that any item of								
Validation and Lock Dat	referred to me for action before the application can be completed.								
✓ Agent Attestations	 *I will personally review the application created from this data and administrative information provided by the proposed insured and contact him or her concerning any incomplete or inconsistent information and I will not deliver the policy unless I have completed my review and am satisfied that the policy, application and all attached papers, if any are complete and accurate. *All forms required to be delivered at time of solicitation have been delivered and all other forms (including privacy notices, if necessary) required have been or will be provided to the applicant. I Agree Submit Ticket 								

- You will know your ticket has submitted successfully when you receive a confirmation number and Next Steps.
- View My Case or My Cases: Displays the history of all tickets entered and the status of that ticket. Click on the Case Actions drop down to open the ticket.

Requirements, CrossBorder American General Life Companies - All states except NY (AGL)	Select A Term	(Save View Forms	Case Actions	•	
	Case Information	AG Quick Ticket				
Proposed Insured	M/h at Llange and Navet				_	
Plan of Insurance	what Happens Next					
Riders and Benefits		Policy 1 419000	6004			
Beneficiary						
Existing Insurance		Policy 2 Not App	licable			
Premium Information		Policy 3 Not App	licable			
PA Disclosure	• ExamOne will contact the applicant within on	e business day of receiving	the ticket to complete the	phone interview.		
Agent Report	If the applicant is not available, ExamOne will leave a message with a toll-free number for the applicant to call. ExamOne will continue to follow up for 14 days.					
Attachment						
✓ Validation and Lock Dat	Interview is completed over the phone.					
✓ Agent Attestations	Average interview takes 20-30 minutes.					
✓ What Happens Next	Information collected includes Application Part A & B, any applicable questionnaires and additional forms as required by the state.					
	 ExamOne schedules the paramedical exam w 	vith the customer.				
	Application is delivered to client to review and sign along with all state-specific supplemental forms.					
	Status information is provided through all pending aggregator sites throughout the process.					
	THE AGENCY					
	Status can be monitored from <u>eStation.amer</u>	icangeneral.com				
	AG QUICK TICKET HELPFUL HINTS					
	When using AG Quick Ticket, no paper forms	are required for the agent t	to complete.			
	The issue state will be the state in which the	policy owner first signs the	application.			

Prepare client for tele-interview and paramedical exam (if exam is needed)

- Once a ticket has been submitted to ExamOne, a representative will call the client to gather the remaining information to complete the Part A.
 - Most clients will receive the call within one business day.
 - If the client cannot be reached after the initial phone call, then follow-up calls will be made every 26 hours during the first 7 business days and every 50 hours over the next 7 business days.
 - At the end of the call, the representative will schedule the paramedical exam (if needed).
 - To help your client prepare for the interview and exam, please refer to our <u>Client Preparation Guide</u>. This guide is also available on Forms Depot.
- Possible delays to completing the interview:
 - Incorrect phone number for the client.
 - Unavailability of the client.
 - Tickets submitted Friday afternoon or Saturday may not be initiated until the following Monday.

- **Signing:** If the client is interested in electronic signing, this can be indicated on the ticket or during the tele-interview.
 - The application packet will be emailed to the insured (and owner if there is another owner) for electronic signature.
- If **eSignature is not selected**, the application packet will be made available to the examiner for collection of the signatures at the time of the exam.*
 - The examiner performs the exam.
 - After the exam is complete, ExamOne will review the paperwork for completeness and will follow up with the client for any missing information.
 - Be sure the proposed insured understands that coverage is not in effect until the application has been approved, all delivery requirements have been received and the initial payment is made.
 - The examiner will collect the signature on the bank draft authorization if the client wishes to pay by this method.

***Note:** If no exam is required, such as sales that qualify for non-medical underwriting, the application will be mailed to your client to sign and return to the Order Fulfillment Center.

Monitor the status of the ticket

- ExamOne's customer portal: portal.examone.com
- Applicant Search: When inputting the applicant information the user will need to provide all of the following:

• First Name	• DOB
Last Name	• Last 4 of SSN

- It is very important that when the applicant information is input the DOB must be in the MM/DD/YYYY format. The applicant's name must match exactly as entered in the application.
- Note: if no SSN is provided for in the application the Association Search will not be an option for the user.
- Case Status: The user will select the "STATUS" option listed in the upper left corner in green. The design is to provide a quick at-a-glance view of the status of the case – Open & Complete. If the case is still open, there would not be a date/time listed.



 To view the actual individual status messages, the user will click the "Open Status Message" option to display all status. The location of this drop down will depend on the product. Included examples are below.

Teleunderwriting Order		Open		Complete
Status: Order date:	Open 02/12/2015 1:19 AM	conjugens 1 19 AM Company Details		
		Account code: Account name:	2772 American Genera	I Quick Ticket/TU/CaseOn
Order notes				
 Status messages 				
Date 🔻	Description	Call source	Call locat	ion
02/13/2015 11:50:00 AM	No answer		Home	
02/12/2015 5:48:21 AM	Order Transferred to the dialer			
02/12/2015 1 21:30 AM	Order Transferred to the dialer			
11A 11-01-1 310010100	Order successfully received			

- For additional information about the overall AG Quick Ticket process, please call your AIG representative.
- For assistance on the information required on the ticket, please contact your BGA.
- For questions on a case after the case has been submitted to American General Life, call 1-800-247-8837, prompt 1 then prompt 2.
 - The messaging system on Connext can also be used for information on pending cases.
 - To monitor a case during underwriting, visit <u>aig.com/Connext</u>.
- Once the case is submitted to American General Life, traditional methods of communication will be used to contact you regarding any outstanding requirements.



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