

Many NMO & BGA partners are reaching out to us during this challenging time with questions about how to process business while complying with the new reality of 'social distancing' and restrictions on travel and movement. The document below was created as though a producer was asking questions of his or her BGA. In addition, we realize that you work with several quality carriers. The questions and answers in this template are meant to be a guide for your team as you walk your producers through processing business in this new environment. There are sample answers that are provided using AIG resources; however, you may want to use your own resources or those that are a better fit from other carriers/sources. Thank you for partnering with AIG and we hope that you find this template helpful.



Sample Frequently Asked Questions: Submitting, Tracking and Delivering a Case

Q: What are my options for submitting a case if I can't see my client face to face?

A: The face to face requirement can be satisfied by using Skype, FaceTime, Zoom or any other video conference application

Q: What electronic options exist if I don't want to take a paper application?

A: Some carriers have their own proprietary quick ticket systems. For example, AIG has 'AG Quick Ticket', and you can access that platform at

- www.aig.com/connext

In addition, there are electronic 'how-to' guides that will get you comfortable using these applications. AIG provides a quick reference guide for AG Quick Ticket:

- https://live.cloud.api.aig.com/life/connext-fdm/download/100AicF6FGkgO9MMYvefTlwGZDaLFdyByzifkefub818lc5yLhxoXeKYM_Y8BzxXKs7KkWBQ79eo64K5EMkZTLK9DQ

There is also a user functionality guide

- <https://adminplus.fgsfulfillment.com/View/AIGAG/1/AGLC105846>

You also may be somewhat familiar with using iPipeline. Many carriers leverage iPipeline to deliver electronic order entry functionality. Below you will find 'how-to' guides for two such platforms... LifeSpeed and iPipeline:

- LifeSpeed
 - https://live.cloud.api.aig.com/life/connext-fdm/download/100AicF6FGkgO9MMYvefTlwGZLBlhQdn6w8rCv31gp60POMZb9Y69Q3217beFFvtS8kF_pdE--7Z8_FOI1qxWDyg
- iPipeline
 - <https://live.cloud.api.aig.com/life/connext-fdm/download/100AicF6FGkgO9MMYvefTlwGZPimDG61Synp5FrdJgAoEixIU7JE2lzxqPzAZHP5FrBo2hPGZ-6bAxPWYbeeUHlfw>

Q: How do I check status of my case submission if your office is shut down due to Coronavirus?

A: While our agency is working remotely right now, we are still fully functional. You will still receive updates on your cases from "XYZ BGA"; however, if you want to check case submission status on your own, a good option is to log into our secure website and access your cases in our new business portal. You can also check status on ExamOne's secure portal – details on how to access are found below.

- https://live.cloud.api.aig.com/life/connext-fdm/download/100AicF6FGkgO9MMYvefTlwGZAqRysjwW_KIZqdHWtF5oS23MoETM92L0g9ChbjEzzVx77mnVVegF685f-rMBj9PmQ

Q: I normally rely on the expert UW team at XYZ BGA... I know you're very busy right now tending to all of your best producers – is there anything you can share that will help me when I have field underwriting questions?

A: Yes, our expert team relies heavily on the feedback from our carrier providers. As such, we pay close attention to their Field Underwriting Guides. One such example – from AIG – can be found below

- <https://adminplus.fgsfulfillment.com/View/AIGAG/1/AGLC101638>

Q: Your office is shut down right now and the entire staff is working remote. Where do I send any paper applications that I collect?

A: While our team is working remote, we are still fully engaged. We are sending someone from our staff to the corporate office to collect mail at 2:00 pm local time each day.

Or

A: While our team is working remote, we are still fully engaged. All mail normally delivered to our corporate HQ is being forwarded directly to our new business director.

Q: I don't like sending paper applications through normal mail. I also don't want to leave my house – how can I send in my paper applications?

A: We strongly encourage you to leverage electronic submittal options when/where available; however, shipping providers like FedEx provide easy options on their websites for you to schedule a pickup at your home or office. See below for details:

- <https://www.fedex.com/en-us/shipping/schedule-manage-pickups.html>

Q: Now that you're working remote, I'm concerned that my client's data may be compromised during email communications between you and the carrier. What steps are you taking to prevent?

A: Each of our team members logs into our company server via a secure Virtual Private Network. In addition, we encrypt each email that includes sensitive client data. Our carrier partners also have secure servers and email encryption built into their processes and procedures – including those who are now operating in a virtual capacity.

Q: Many times carriers will need additional requirements signed prior to the policy being issued and/or delivered. How will I be able to move my case forward without seeing my client for signatures?

A: Our expert team is closely monitoring carrier adjustments in real time; however, what we are finding is that many carriers are moving “wet signature” requirements to DocuSign. In addition, many carriers already do a good job of allowing follow up requirements to be signed at policy delivery. That brings up another couple of questions:

Q: Are you monitoring requirements for any possible delays?

A: Yes, carriers like AIG leverage technology to keep us updated on how your cases are progressing. I mentioned www.aig.com/connext earlier, but that site is also where we track each individual case.

Q: If I cannot see my client face to face, how will I deliver the policy?

A: Carriers provide PDF copies of the actual policy on their new business websites, so we will get an electronic copy of the policy for your review. In addition, and in an effort to safeguard client data, many carriers are taking steps to send the physical policy directly to your client. You can setup a virtual appointment with your client to review and deliver the policy. You will have the electronic copy, and they will have the hard copy.

Q: How can my customers manage their policies online?

A: Enroll in eService at www.aig.com/eService

More information can be found here: <https://adminplus.fgsfulfillment.com/View/AIGAG/1/AGLC110816-CON>

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