

Protective Velocity

TeleLife[®]

Using TeleLife with EZ-AppSM

EZ-App is an intuitive, drop-ticket platform that provides a quick and easy way to electronically submit a pre-application to TeleLife.

Key features and benefits of EZ-App

- Available 24 hours a day, 7 days a week.
- Built-in quote feature.
- Agent signature is electronically attached at the time of submission.
- Immediate ability to complete application interview.
- Reduced data entry errors and not-in-good-order (NIGO) applications.
- Dynamic and adjustable fields based on client and policy information.
- Application turnaround time cut by 14 days.

Submitting business using EZ-App

- Access EZ-App through JonesLink.
- EZ-App will guide you through the submission process, prompting you for the necessary information at each step.
- Complete all sections of the application and applicant will need to provide the phone number(s) he or she is willing to use for completing the interview.
- Schedule the client's interview and provide the client with the toll free number, 888-800-6608, so they are aware of TeleLife's caller ID. They may also call in and complete their interview.
- Utilize the pre-submission review to edit any incorrect information.
- Agree to the Agent Attestation within the application. This will serve as your electronic signature.

Conditional coverage with EZ-App

If the applicant opts for conditional coverage, the agent will have the opportunity to request conditional coverage during the online submission. The initial payment for conditional coverage will be processed when the home office receives the application packet.

Do not request conditional coverage or collect premium if the proposed insured:

- Is under 15 days of age or over age 80.
- Has been admitted to a hospital or other medical facility, been advised by a medical professional to be admitted, or had surgery performed or recommended within the past 90 days.
- Has had treatment recommended by a medical professional for heart trouble, stroke or cancer within the past two years.
- Has been rated or declined for insurance within the past five years.
- Intends to leave the United States within the next 60 days.

Acceptable payment methods:

- Pre-authorized withdrawal from checking or savings account.
- Client's Edward Jones account.

Additional information on next page.

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After the ticket is submitted with EZ-App

- Prepare the applicant for the interview. Utilize the Applicant's Checklist to ensure the applicant understands the time and purpose of the interview.
- Provide the client with the toll-free number, 888-800-6608, option 1, to call and complete the interview.

Confirmation and TeleLife processing

- After the EZ-App pre-application is submitted, the agent receives an immediate confirmation including the policy number.
- Illustrations for universal life products are mailed directly to the applicant when a signature is required, with a return envelope.
- Using the EZ-App online submission entry, the information is uploaded directly into the interview system and the client is contacted within 24 hours to complete the application interview. During the interview, the interviewer will place the exam order with the paramedical vendor, if necessary.



Let's work together for better protection and simpler solutions for you and your clients.

Life insurance products are issued by Protective Life Insurance Company (PLICO), located in Nashville, TN and Protective Life and Annuity Insurance Company (PLAIC), located in Birmingham, AL.

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