



VELOCITY ONLINE PART II

Reference Guide

Protective refers to Protective Life Insurance Company.
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Here's what the process looks like

Agent process

- Agent completes required eApplication questions in the Edward Jones Digital Life Platform
- After all sections of the eApplication are complete, the agent clicks "Prep Online Interview" to initiate online part II.
- Agent allows customer to complete online part II or walks through the interview with the customer (assisted vs. unassisted)
- After online part II is completed, the agent completes attestation and locks the application for signatures

Customer Process (Agent Assisted)

- Customer receives link to complete the questions online
- Customer consents to doing business online, honesty statement and e-signs HIPAA
- Agent is contacted when the customer is ready for assistance
- Agent connects with customer to walk through the interview with them
- After online part II is completed, the agent completes attestation and locks the application for signatures. This initiates an Adobe e-sign email to the customer.
- Customer reviews and e-signs completed packet
- After Edward Jones home office review, the completed application packet is transmitted to Protective

Customer Process (Unassisted)

- Customer receives link to complete the online questions
- Customer consents to doing business online, honesty statement and e-signs HIPAA
- Customer reviews and completes online interview (part II)
- After online part II is completed, the agent completes attestation and locks the application for signatures. This initiates an Adobe e-sign email to the customer.
- After Edward Jones home office review, the completed application packet is transmitted to Protective



Contact your Protective representative with any additional questions.



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

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