New Business Playbook

- Click on any of the linked resources to learn more

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Submitting the case

- Case Submission Checklist
- Application Part A Checklist
- Where to Submit Business
- Submitting Other Companies' Exams

Client preparation guides

- Preparing For Your Life Insurance Exam
- Preparing For Your Telephone Interview and Life Insurance Exam
- Client Guide to Electronic Policy Delivery

Tips and guides

- Initial Premium Guide
- Matching State Forms is Key
- Illustrations & Quotations Guide
- Limited Temporary Life Insurance Agreement (LTLIA)
- Replacement Coverage and Forms
- 1035 Exchange Guide
- iGO eSignature Producer Guide
- Pending Business Tips
- Preferred Vendors
- DocFast eDelivery: Quick Reference Guide - Carrier-Agency-Client (CAC) Workflow

Additional resources

- Underwriting Playbook
- AG Quick Ticket Playbook
- Retire Stronger

To get your case off to the best possible start:

- Make sure key data is accounted for on the Application Part A. For details see our Application Part A Checklist.
- State forms must match the Application Part A state.

The faster a case can be reviewed, the faster it can be issued and paid!

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