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BUSINESS CASES

KEY PERSON Cases

BUSINESS LOAN Cases

BUY-SELL Cases

Doing BUSINESS CASES at Protective Life

Understanding requirements **BEFORE** taking the application makes the underwriting process **MUCH EASIER**.

COVER LETTERS are **ALWAYS RECOMMENDED** for business cases. Take the opportunity to paint the picture **YOU** want the underwriter to see.

Using **TELELIFE** (electronic submission) is **NOT RECOMMENDED**. Reasons being:

- The insured is subject to a phone interview, and might not be prepared to answer business-related questions. *Example:* Buy/Sell applicants might have varying answers regarding business value, revenue, etc.

- Companion business cases are not automatically linked together. Providing a cover letter with paper applications will direct the cases to be linked as companions.

- TeleLife / eSubmission cases prompt Protective to order requirements (if necessary....Paramed Exam, APS, etc.). By submitting a paper application, the Brokerage General Agency maintains control of this process.

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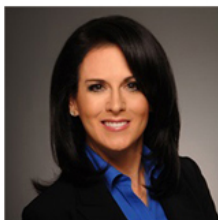
Contact Jeff, Eleanor, or Frank today to discuss your case questions.

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