

## CARRIER ELECTRONIC PLATFORMS AND RESOURCES

Carrier	Accelerated Underwriting	eApp	eTicket	Paper Ticket	eInterview	Phone Interview	eSignature	Voice Signature	ePolicy	eDelivery
Banner Life	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Corebridge	✓	✓	✓			✓	✓		✓	✓
Equitable	✓	✓	✓			✓	✓		✓	✓
F&G Life	✓ <sup>2</sup>	✓				✓	✓		✓	
Foresters Financial	✓	✓				✓	✓			✓
Global Atlantic	✓	✓					✓			
John Hancock	✓	✓	✓	✓	✓	✓	✓		✓	✓
Lincoln Financial	✓	✓	✓	✓	✓	✓	✓	✓ <sup>1</sup>	✓	✓
MassMutual										
Mutual of Omaha	✓	✓	✓			✓	✓		✓	✓
Nationwide	✓	✓			✓	✓	✓	✓	✓	✓
New York Life		✓					✓ <sup>3</sup>		✓ <sup>4</sup>	✓ <sup>5</sup>
North American	✓	✓			✓	✓	✓	✓	✓	✓
Principal	✓	✓	✓		✓	✓	✓		✓	✓
Protective Life	✓		✓	✓	✓	✓	✓	✓	✓	✓
Prudential	✓	✓	✓	✓	✓	✓	✓		✓	✓
Sagicor	✓	✓			✓		✓		✓	✓
Securian Financial	✓		✓		✓	✓	✓		✓	✓
Symetra Financial	✓	✓					✓		✓	✓ <sup>6</sup>
Transamerica	✓	✓					✓		✓	✓
William Penn	✓		✓	✓		✓	✓	✓	✓	✓
Zurich		✓					✓		✓	✓

✓ Indicates the Core Carrier offers this capability/service

<sup>1</sup> TermAccel Only

<sup>2</sup> Non-Med Underwriting through \$1MM

<sup>3</sup> eSignature is inclusive of the NYL eApp process only. DocuSign is not an approved method of esignature outside of our eApp process/system.

<sup>4</sup> A pdf copy of the policy will be provided as part of the delivery process, however, we do not accept electronic signatures on that copy. See edelivery tab for more details.

<sup>5</sup> A BGA must have an active DocFast/iPipeline account. Contact your NB Case Manager for execution and additional details.

<sup>6</sup> We offer Adobe Sign with PDF delivery of the contract, we still must mail a paper policy either to the BGA for delivery or direct to the customer. Please specify in your transmittal. Swift Term offers full E-Delivery

## ADDITIONAL DETAILS AND RESOURCES

Resource	Description	AIN Resource
Accelerated Underwriting	Streamlined underwriting processes with the possibility of lab-free and APS-free underwriting for qualifying clients.	<a href="#">Accelerated Underwriting Program Details</a>
eApp	A full long-form application completed either via a web portal or fillable pdf.	<a href="#">eApp and Ticket Platform Details</a>
eTicket	An electronic, simplified application used to initiate a streamlined application process administered by the carrier.	<a href="#">eApp and Ticket Platform Details</a>
Paper Ticket	An paper-based, simplified application used to initiate a streamlined application process administered by the carrier.	<a href="#">eApp and Ticket Platform Details</a>
eInterview	Application Part B/Part 2 questions completed via a web portal.	<a href="#">eInterview &amp; Phone Interview Platform Details</a>
Phone Interview	Application Part B/Part 2 questions completed via a phone interview with carrier staff or their preferred provider.	<a href="#">eInterview &amp; Phone Interview Platform Details</a>
eSignature	Signatures on applications and other forms captured via an electronic signature process	<a href="#">eSignature &amp; Voice Signature Details</a>
Voice Signature	Signatures on applications captured via voice during phone interview	<a href="#">eSignature &amp; Voice Signature Details</a>
ePolicy	An electronic copy of the policy	<a href="#">ePolicy &amp; eDelivery Platform Details</a>
eDelivery	The ability to execute the delivery requirements electronically.	<a href="#">ePolicy &amp; eDelivery Platform Details</a>

**Important:** Not all of the elements listed above are available in combination with some/all of the other elements. As an example, an Accelerated Underwriting platform may not allow for the use of a Paper Ticket process. Please click through to the individual resources for that level of detail.