

# Quick Start Card



## LIFE INSURANCE APPLICATION PROCESS

<b>01</b>	<b>LICENSE WITH CARRIER(S)</b>	Go to <b>www.amsforlife.com</b> , click on [Licensing] and complete the online licensing process or contact the <b>AMS Licensing Department</b> at <b>(888) 303-8755</b> . (Note: Some states require agents to be licensed prior to solicitation.)
<b>02</b>	<b>OBTAIN NEW BUSINESS APPLICATION &amp; NEW BUSINESS TRANSMITTAL*</b>	You can obtain <b>New Business Applications</b> <u>two</u> ways: <ol style="list-style-type: none"><li>Go to <b>www.amsforlife.com</b>, click on [Agent Services], (registered users, login with your username and password), then click on [View Forms], then follow the prompts to download the required forms.</li><li>Call <b>(866) 546-5267, Option 2</b>.</li></ol> <b>*New Business Transmittal</b> Go to <b>www.amsforlife.com</b> click on [New Business Transmittal] on homepage.
<b>03</b>	<b>SEND TRANSMITTAL &amp; APPLICATION TO AMS</b>	Mail all paperwork* to: <b>AMS for Life</b> <b>Attn: New Business</b> <b>15050 Avenue of Science, Suite 100</b> <b>San Diego, CA 92128</b> <i>*If Carrier allows faxes please fax to: <b>(858) 207-1793</b></i>
<b>04</b>	<b>CASE MEMO SENT</b>	Case memo sent to Agent via e-mail stating application has been received.
<b>05</b>	<b>ORDER INITIAL MEDICAL REQUIREMENTS</b>	The Agent indicates on the <b>New Business Transmittal</b> who will order the medical requirements. If the Agent is ordering requirements, no action will be taken by <b>AMS for Life</b> ®. (Note: Additional case requirements will be managed by <b>AMS for Life</b> ® as requested by the carrier.)
<b>06</b>	<b>CASE MANAGEMENT</b>	You can obtain case status <u>two</u> ways: <ol style="list-style-type: none"><li>Go to <b>www.amsforlife.com</b>, click on [Agent Services], (registered users, login with your username and password), then click on [Access Case Status]. Case notes can be viewed and comments or questions can be submitted.</li><li>Call <b>(866) 546-5267, Option 2</b>.</li></ol>
<b>07</b>	<b>CASE APPROVED</b>	Once all underwriting requirements have been received and an offer has been made by the carrier, an <b>"Approval Notification"</b> will be e-mailed to the Agent.
<b>08</b>	<b>POLICY ISSUED</b>	Issued policy will be mailed to the Agent noting any outstanding delivery requirements. The completed delivery requirements should be mailed direct to the carrier with a faxed copy to AMS for Life at (858) 207-1793.