

SimpliNow Legacy eApp Tips

LIFE INSURANCE

2023



Quick Tips for writing SimpliNow Legacy (SIWL) eApps

Getting Started:

- **eApp URL:** www.corebridgefinancial.com/CONNEXT
→ SIWL eApp Link on your homepage.
- **Best Browsers to use:** Chrome, Firefox, Edge
- **Best Browsers for mobile:** Chrome, Firefox
- **Pop-Up Blockers:** For best eApp experience, turn off or allow Corebridge Financial sites. Look up how to disable pop-up blockers for your specific device and OS online.
- **Internet Connection/Speed:** Check for strong connections before starting an eApp. Wi-Fi and Wireless Network speeds vary and can affect eApp performance.
- **iGO / iPipeline sessions:** Only have (1) app session open at a time to not affect eApp performance.

eApp tips:

- **Overall, remember, "Green means Go":** Throughout the eApp, a green message box or a green checkmark means you can continue with the application.
- **Ok to Sell Validation:** You can click the "Ok to Sell" button more than once if the initial request doesn't run.
- **Client Validation:** Make sure to check what you're entering into the app. Use your clients' government-issued I.D.s and review each section with your client to prevent typos and confirm accuracy. You get 3 attempts before having to quit the application.
- **Instant Underwriting/Health Questionnaire:** Read all on-screen text and questions carefully. Take time to ensure your clients understand what is being asked and get their most accurate answer.
- **Underwriting Authorization:** Applicants must check the box for Electronic Consent and Disclosure.
- **Underwriting Results:** Don't see a result? That means the underwriting engine is running.
 - Click "Underwrite Case" to help. Still not seeing a result? Close both the eApp and Connex, wait a few minutes before logging in, and click "Underwrite Case".

- Client wasn't approved for SimpliNow Legacy Max (Level Death Benefit)? We'll tell you why so you can discuss the best coverage option for your clients.
- **Payment:** Bank draft, Credit/Debit Cards, Direct Express are accepted and do not impact your commission. Read all on-screen text carefully to your client. Some text may ask for client authorization for temporary holds and/or drafts. Our payment validation process may use temporary holds. If payment cannot be validated or funds are not available to execute the hold, ask the client if they'd like to use different payment types for the initial and recurring payments and set up in the eApp accordingly.
- **How temporary holds work:**
 - If issue date/draft is requested same-day or within 72 hours of application:
 - The full premium amount will be held and drafted as determined by timing of app submission and requested policy issue date.
 - If issue date/draft is requested outside of 72 hours:
 - Only \$0.01 is needed on the account for the temporary hold then released. Draft will occur on the later issue date.
- **eSignatures:** If these don't appear when expected, close the eApp and Connex, log in after a few minutes, and try again. Other tips:
 - Your client's PIN is the last 4 of their SSN.
 - Check SPAM folders
 - Keep the signature process open until you see the confirmation message or you have 2 options: Cancel and create a new request, or unlock and lock the application to resend the request.

Questions? We're here to help.

Corebridge Financial Sales Support:

TMGSales@corebridgefinancial.com

1-877-399-7747. 8 a.m. to 6 p.m. CST. M-F

Policies issued by **American General Life Insurance Company** (AGL), Houston, TX. Policy Forms: ICC21-21445, 21445, 21445-5, 21445-10, 21445-35, 21445-42, ICC21-21447, 21447, 21447-5, 21447-10, 21447-35 and 21447-42. Rider Numbers: ICC21-21468, 21468, 21468-5, 21468-10, ICC21-21469, 21469, 21469-5, 21469-10, ICC21-21470, 21470, 21470-5, 21470-35 and 21470-42. **AGL does not solicit, issue or deliver policies or contracts in the state of New York.** Guarantees are backed by the claims-paying ability of the issuing insurance company and each company is responsible for the financial obligations of its products. Products may not be available in all states and features may vary by state. Please refer to the policy for more information. All companies above are wholly owned subsidiaries of Corebridge Financial, Inc. Corebridge Financial and Corebridge are marketing names used by these companies. This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. Clients should consult with their financial professional regarding their situation. For legal, accounting or tax advice consult the appropriate professional. AGLC202125 © Corebridge Financial, Inc. All rights reserved. **FOR FINANCIAL PROFESSIONAL USE ONLY. NOT FOR PUBLIC DISTRIBUTION.**