



Checklist

Use this list to ensure that your responsibilities as the agent have been fulfilled.

- Complete the Request for Life Insurance Interview form (LAA1297).
- Do not accept credit card information for interest in coverage in excess of \$500,000 (\$250,000 in CA) or if the proposed insured is older than age 70. ONLY THE INITIAL PREMIUM can be paid by credit card. If this is the client's preference, the appropriate authorization forms will be sent at the time of policy delivery. Credit cards will not be charged until the application is completed, all delivery requirements are received and the policy is issued. (Not available in Alaska, Maryland, New Jersey, North Carolina and Oklahoma.)
- DO NOT ACCEPT CASH OR CHECKS. If the client prefers to pay by check, payment will be requested when and if the application is approved.
- It is to your advantage to be sure the client receives a copy of the *Thank You for Your Interest...* form. The Banner Life Call Center will also email a copy prior to its phone call. The brochure version, LAA1374, can be ordered through your general agency. The LAA1373 form in PDF format can be printed and given, emailed or faxed.
- Make sure the client understands that life insurance coverage is not in force until the application is approved and the first premium and any delivery requirements have been received. Application approval is not guaranteed.
- At the conclusion of the e-Link interview select submit at www.LGAppAssist.com. You can also fax RLI from (LAA1297) to 301.294.6960, email to Banner-Submit@LGAmerica.com or mail to Banner Life Insurance Company, 1701 Research Blvd., Rockville, MD 20850.

For copies of forms, ratecards or customer brochures, see your general agency, your general agency website or www.LGAmerica.com.



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