

# eDelivery made easy

Say goodbye to paper policies



With eDelivery, you can take advantage of our electronic delivery tool on a case-by-case basis. Experience faster service, cost savings, enhanced security and more.

## How to use eDelivery

1. Collect the email address your client wants to use for eDelivery of their policy.
2. Complete the Banner Life or William Penn eDelivery Authorization Form (LU1321 or LU1321WP) with your client's email and submit it with new applications or to your Banner Life family of companies' contact for those in force.
3. As soon as the policy is approved and issued, it will be emailed to your client's email. It's that simple!

## On your own terms

Choose the option that best fits the needs of your agency

### Nonstop option

The issued policy is sent to your agency and the client simultaneously. Clients can sign policy documents immediately.

### Concerned about "other than applied for"?

Use the Layover option to review cases that are issued "other than applied for" and the Nonstop option for all other cases.

### Layover option

The issued policy is sent to your agency for release approval. Action must be taken to sign or reject policy within five days. Once the GA has approved the policy, it is eDelivered to the customer for signature. If no action is taken by the GA within the allotted time, the policy will be sent to the customer for an electronic signature.

**Note:** To enroll your agency in eDelivery, submit the eDelivery Registration Form to your Internal Wholesaler. This one-time submission will ensure that your entire agency is set up for eDelivery.

## General information

For a policy to be eligible for eDelivery, the proposed insured, policy owner, and payor must be the same and consent to eDelivery. eDelivery applies to policies that meet the initial premium payment, good health statement, delivery receipt, and amendment.

Email to policy owner will have detailed instructions. No action is required by you or your agency once the policy is released.

Reissues are completed within 24 hours and re-sent to the customer. Reissues requiring underwriting approval will require additional time.

**Want to learn more about eDelivery? Visit us here.**

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