

eDelivery at a glance

Layover option: Gives you more control

● Case-by-case

Non-AppAssist — To help your client opt-in for eDelivery through DocuSign, work with your client to complete the eDelivery Authorization form (LU1321WP) and submit with the application.

AppAssist — Proposed insured must complete tele-app and opt-in for eDelivery through DocuSign using voice signature.

● Approval and issuance

The issued policy is sent to GA for review. GA has 5 business days to sign or release the policy. If released, it is eDelivered to the customer for signature. If GA takes no action, the policy is sent to the customer for an electronic signature.

● Document processing

When customer completes signing, all documents are transmitted back to the Banner Life family of companies for processing. More than half of eDelivered policies are signed by the policy owner within 7 days.

● Activation

Delivery documents are signed and the policy is activated.

● Commission

EFT commission is processed within 24 hrs of policy activation and can be paid daily or according to your chosen pay schedule.

General information

Email to policy owner will have detailed instructions. No action is required by the GA or broker.

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

DocuSign® is the third-party vendor used to facilitate the electronic signature, payment and contract execution for applications outside Horizon.

Policies eligible for eDelivery

Proposed insured, policy owner, and payor must be the same.

eDelivery through DocuSign applies to policies that meet the initial premium payment, good health statement, delivery receipt, and amendment.

Please note, NY Regulation 60 replacement cases are not eligible for eDelivery.

**Scan the QR code
to learn more**

