

Rising to meet life's greatest legacies

Meet your dedicated underwriting team



Large cases come with unique challenges, but they also present opportunities for you to strengthen relationships, deliver more value and drive business growth.

At Banner Life Insurance Company and William Penn Life Insurance Company of New York, ("The Banner Life family of companies"), we're elevating our large case underwriting with dedicated expertise, a more structured process and proactive communication — making it easier for you to navigate complex cases and secure the best possible outcomes.

Exclusive support for cases \$5M+ in face or \$10K+ in annual premium

A dedicated large case underwriting team designed to move business forward with clarity and confidence.

- A single underwriting contact. One senior underwriter manages the case from submission to offer.
- Eight senior underwriters. Each with sign-off authority for \$10M+ and over 15 years of experience in brokerage underwriting.
- Direct, proactive communication. Including personalized email updates on underwriting findings.
- Clear, transparent decision-making. Detailed explanations of how medical and financial results impact class and final decisions.
- Capacity for large cases. Autobind limit of \$30M and jumbo limit of \$65M.
- Seamless case management. High-touch service tailored to the needs of BGAs handling clients with higher protection needs.

Enhanced support for cases \$2M to \$4.99M

Stronger communication, more flexibility and a structured approach to case management.

- More transparent and frequent communication. Ensuring a better experience for BGAs.
- Structured case management. Reducing inefficiencies and minimizing unnecessary back-and-forth.
- Greater underwriting flexibility. Evaluating complex cases with a more customized approach.
- No instant declines or postpones on cases \$2M+. Every case is reviewed by an underwriter before a decision is made.

Your dedicated underwriting team:



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Let's move business forward together

Connect with your team to learn more

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