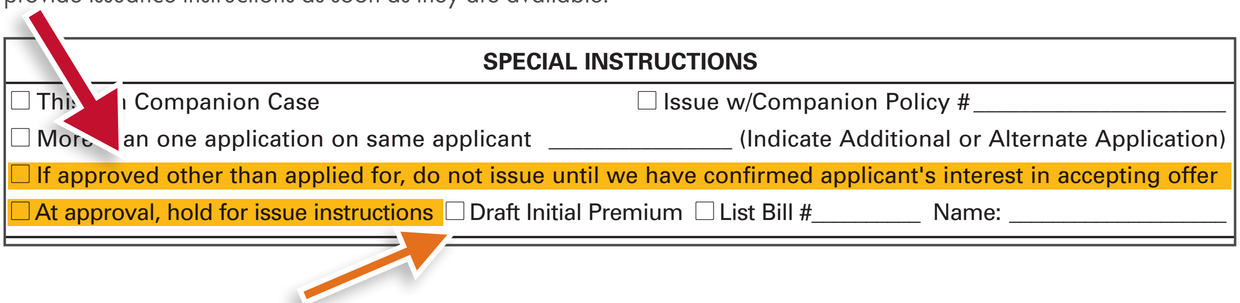
Pending Business Tips

Pointers and best practices to keep your cases flowing smoothly

- ✓ **Enable case notifications in Connext** to ensure you can respond quickly when requirements are posted. Access the Notifications Settings through your **Connext** Profile.

- ✓ **If you selected one of the 2 options highlighted below** in the Special Instructions section of the Transmittal sheet, provide issuance instructions as soon as they are available.



SPECIAL INSTRUCTIONS

☐ Thi[illegible] Companion Case ☐ Issue w/Companion Policy #____________

☐ More[illegible] an one application on same applicant __________ (Indicate Additional or Alternate Application)

☐ If approved other than applied for, do not issue until we have confirmed applicant's interest in accepting offer

☐ At approval, hold for issue instructions ☐ Draft Initial Premium ☐ List Bill #______ Name: ____________

- ✓ **If you checked the box indicating the initial premium would be drafted,** please submit the Bank Draft Authorization form as soon as possible to avoid possible delays due to validation errors.

- ✓ **If you change the mode for any UL product,** a new illustration will be required. Please run and submit the new illustration as soon as possible.

- ✓ **If you plan to add new riders,** submit the change as soon as possible. The case will be sent back to Underwriting for review and additional forms may be needed.

- ✓ **For 1035 Exchanges,** external funds are requested at time of issue so make sure the **Absolute Assignment form for 1035 Exchanges** and state-specific **Replacement** forms are in good order. For additional information, see our **Replacement Coverage and Forms** guide.

We're here to help you

Getting your client's policies approved and delivered as quickly and efficiently as possible is a team effort, and we are here to support you. If you have any questions, please reach out to your agency's Case Relationship Manager.

AIG®