

Pending Business Tips

Pointers and best practices to keep your cases flowing smoothly



- ✓ **Enable case notifications in Connex** to ensure you can respond quickly when requirements are posted. Access the Notifications Settings through your **Connex** 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	
<input type="checkbox"/> This is a Companion Case	<input type="checkbox"/> Issue w/Companion Policy # _____
<input type="checkbox"/> More than one application on same applicant _____ (Indicate Additional or Alternate Application)	
<input type="checkbox"/> If approved other than applied for, do not issue until we have confirmed applicant's interest in accepting offer	
<input type="checkbox"/> At approval, hold for issue instructions	<input type="checkbox"/> Draft Initial Premium <input type="checkbox"/> 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.



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