



Instructional Guide for Electronic Application Submission System

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### Section 1: How to Access

#### Go to www.globalatlantic.com

- 1. Log in to your Independent Agent Account
- 2. Select the SnapApp button at the top of the page
- 3. A notice will appear that you are leaving the web site. Select Agree to proceed.

### Section 2: New Application

#### From the main screen you may select:



### To create a New Application

- 1. Select New Application
- 2. Jurisdiction: Select your state
- 3. Product Type: Select Fixed Index Annuities
- 4. Select Product
- 5. Required Forms will be shown, select Create Application
- 6. Enter a unique name for this application. Select **Create**.

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Fixed Annuity	Forethought Life Insurance Company	ForeCertain Immediate Income Annuity	
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You will then be taken into the application. This is similar to the standard application you are used to seeing. Required fields show in red. Additional required fields may display, depending on selections made throughout the application.

Please note: If you don't enter a mandatory field, you can continue to the next page but **cannot** submit the application.

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(Plaza Print)					Single F	Forethoug Premium Def Forethoug	ht Indexed Annuities <sup>sat</sup> Income 150+ ierred Annuity Application ght Life Insurance Company One Forethought Center P.O. Box 246 Batesville, IN 47006-0246	
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SOFER	Income 150+ Application	Page 3
	5. ANNUITY TYPE (Select One)	_
	If applicable, has the Required Minimum Distribution for the current tax year been met? Yes No	
	C. PREMIUM PAYMENT     Set State of the set of the	office ase?
	Source of Premium Payment: Check Wire 1035 ExchangeTransfer V (Payable to: Forethought Life Insurance Company)	
	7. STRATEGY(IES) ALLOCATIONS	
K	PREMIUM ALLOCATION DIRECTION (Minimum of \$5,000 per Allocation.) Whole FIXED and INDEXED STRATEGIES: Only Only	
	1-Year Fixed Strategy	
	One-Year Point-to-Point with Cap Indexed Strategy %	
	Sinclays ARMOUR II Triennial Spread Indexed Strategy 100 × %	
	Total Must = 0 9	6
	8. Available Rider(s)	
	Market Value Adjustment Endorsement	

For each form and page of the application, the system will walk you through each respective section to ensure everything is filled out in its entirety.

# Section 3: Using E-Signature

Once this section is completed you will be brought to the Signatures section where you and your client can electronically sign the application. This is optional. You may still have the application printed and hand signed if you so choose. If you are choosing to electronically sign you can email the application to the owner to sign as well, if need be.

*Please note: If you missed any required information, you will not be able to access the signatures and submit sections.* 

#### Select Use E-Signature

Note: Once you select this option, you cannot make any further edits to the application.

#### Signature Types:

**Owner:** Person who owns the annuity (may be the same person as the annuitant)

Agent: Person selling the annuity

Once all necessary signatures are complete, you may submit the application for review. If there is any outstanding information necessary to process the application, we will reach out to you directly.





### Section 4: Miscellaneous

**Attachments:** If you need to include any documents that support the application (or are required) you may attach them to your application under **Other Actions, Documents**.

- 1. Complete the application (do not submit yet)
- 2. Gather required signatures
- 3. Create a PDF of the document(s) you want to attach
- 4. Click Other Actions and select Documents
- 5. Choose the file type and upload to attach the document

**Notifications:** You may see various notifications throughout the application process. Many of these notifications are tips to help simplify the process.

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Choose File	No file	chosen				
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# Section 5: Using SnapApp in an Offline Environment

You can use the Console tool to edit/complete an application when there is no internet connectivity.

Install Console on your device (requires devices running Windows Vista+):

- 1. Click on My Preferences
- 2. Select **Add New Device** (in the Mobile Access section)
- Copy the Activation Key (or click **Send Key** to get it in an email)
- 4. Click **Get Install** and follow the instructions to install Console

You'll be prompted to enter the Activation Key and create a 4-digit PIN

### **Using Console**

#### While connected to the internet:

- 1. Create an application in SnapApp using your browser
- 2. Open Console by selecting it from the Insurance Technologies folder in your Windows Start Menu
- 3. "Check Out" the application(s) created in Step 1

The "Checked-Out" application(s) can now be completed in Console at a later time even if internet is not available.





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### Editing/completing the application in Console – internet is not required

- 1. Open the "Checked-Out" application in Console
- 2. Enter application information just as you would in the SnapApp browser view. Any information entered, including electronic signatures is saved.

### When connected to the internet

- 1. Use Console to "check-in" the application
- 2. Use the SnapApp browser view to submit the application

Applications 🥹			
On Device - Jen G's Laptop			
Robert Jones	Form Entry	4/22/2014 Evolves 52 class 20 hours	0
Robert Jones	Signatures	4/17/2014 Expires 47 days, 22 hours	C
On Server		Check Out Sel	ected 0
ICCFA Test2	Locked	4/29/2014	4
New Application - Advance 219	Form Entry	4/28/2014	
test	Form Entry	4/23/2014	
Robert Jones - MH	Signatures	4/17/2014	- 1
John Galt	Form Entry	4/17/2014	
Clarissa Forsythe	Signatures	4/15/2014	
CA Test App	Form Entry	4/15/2014	
NC Final Expense	Form Entry	4/15/2014	
FEC	Form Entry	4/15/2014	
Final Expense Example	Form Entry	4/15/2014	
Console Test	Locked	4/15/2014	
Test	Form Entry	4/14/2014	
New Application - Advance 65	Form Entry	4/9/2014	
robert jones	Form Entry	4/9/2014	
robert Jones	Form Entry	4/9/2014	
robert jones	Signatures	4/9/2014	
Robert Jones	Signatures	4/9/2014	
Robert Jones	Form Entry	4/9/2014	
Robert Jones KG	Signatures	4/9/2014	
Robert Jones - MH	Locked	4/9/2014	

### **Supported Browsers:**

- Microsoft Internet Explorer, Version 9+
- Mozilla Firefox Version 7+
- Google Chrome Version 14+
- Safari Version 5+
- iPad tablet running iOS 5+
- Tablets running Android OS 2+
- Console (offline) tool requires devices running Windows Vista+



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