



KEY CONTACTS

- American-Amicable Life Insurance Company of Texas.....www.americanamicable.com
- iA American Life Insurance Company.....www.iaamerican-waco.com
- Occidental Life Insurance Company of North Carolina.....www.occidentallife.com
- Pioneer American Insurance Company.....www.pioneeramerican.com
- Pioneer Security Life Insurance Company.....www.pioneersecuritylife.com



LIVE CHAT is available to address your support inquiries and is the quickest way to reach a customer service representative. To access Live Chat, log into the Marketing Sales page on the Company websites and click on Live Chat.

LIVE CHAT is available Monday - Friday 8:00 a.m. - 4:45 p.m, Central Time (excluding holidays).

You can also reach us using the following automated numerical prompts after dialing (800) 736-7311. Phone support is available Monday - Friday 8:00 a.m. - 4:00 p.m, Central Time (excluding holidays).

The following is a list of prompts that can be pressed to reach the various departments:

<u>DEPARTMENT:</u>	<u>PROMPTS:</u>	<u>DEPARTMENT:</u>	<u>PROMPTS:</u>
Agent Contracting	1, 1, 3	New Business Agent Support	1, 1, 1
Client Experience/Reinstatements	1, 1, 7	Supplies	1, 1, 6
Commissions	1, 1, 4	Risk Assessment	Live Chat Only
E-Application	Website: www.insuranceapplication.com/mobile		
New Application Submission (Paper)	Website: www.insuranceapplication.com/appdrop		Fax: (254) 297-2100
New Agent Contract Submission	Website: www.insuranceapplication.com/contractdrop		Fax: (254) 297-2110

SERVICE HOURS

LIVE CHAT

8:00 a.m - 4:45 p.m. Monday - Friday
Central Time (excluding holidays).

PHONE HOURS

8:00 a.m - 4:00 p.m. Monday - Friday
Central Time (excluding holidays).

MAILING ADDRESS

P.O. Box 2549
Waco, Texas 76702-2549

MAIN COMPANY PHONE NUMBER

(254) 297-2777

DEPARTMENTAL LISTING

			EXT.	FAX NUMBER (254) 297-2710
EXECUTIVE				
Joe Dunlap	President	jdunlap@aatx.com	3525	
Josh Pedelty	Sr. Vice-President	josh.pedelty@aatx.com	3570	
MARKETING SALES				
Darren Sliva	Sr. Vice-President	dsliva@aatx.com	3466	
Jay Csipkes	Vice-President	jcsipkes@aatx.com	3417	
Paula Forero	Vice-President	pforero@aatx.com		
Darren Hancock	Vice-President	dhancock@aatx.com	3203	
Pete Mejia	Vice-President	pmejia@aatx.com	3416	
Michelle Hilliker	Assistant Vice-President	mhilliker@aatx.com		
Roberto Silva	Assistant Vice-President	rsilva@aatx.com		
MARKETING OPERATIONS (CONTRACTING & COMMISSIONS)				
Julio Ortega	Vice-President	jortega@aatx.com	3263	(254) 297-2110
Brady Kaufmann	Director	bkaufmann@aatx.com	3342	
AGENT CONTRACTING				
Heather Strange	Supervisor	hstrange@aatx.com	3262	(254) 297-2126
Erica Haney	Senior Contracting Analyst	ehaney@aatx.com	3569	
Karen Claridy	Agent Contracting Analyst	kclaridy@aatx.com	3812	
COMMISSIONS				
Michelle Seljos	Supervisor	msejlos@aatx.com	3307	(254) 297-2126
Valerie Burrow	Debt Collection Analyst	vburrow@aatx.com	3303	
NEW BUSINESS OPERATIONS				
Tina Holcomb	Sr. Vice-President	tholcomb@aatx.com	3871	
AGENT SUPPORT				
Kayelee Watson	Manager	kwatson@aatx.com	3261	(254) 297-2100
Ashley Steele	Team Lead	asteele@aatx.com	3505	
Matt Kolb	Senior Analyst	mkolb@aatx.com	3441	
Taylor Reese	Senior Analyst	treese@aatx.com	3265	
POLICY ISSUE				
Donna Nelson	Manager	dnelson@aatx.com	3387	(254) 297-2101
UNDERWRITING				
Katy Shaw	Manager	kshaw@aatx.com	3470	(254) 297-2102
Kim Christian	Chief Underwriter	kchristian@aatx.com	3269	
Risk Assessments		riskassess@aatx.com		EMAIL OR LIVE CHAT ONLY
IN-FORCE OPERATIONS				
CLAIMS				
Dennis Fones	Manager	dfones@aatx.com	3518	(254) 297-2756
Shiniqua Sterling	Supervisor	ssterling@aatx.com	3538	
CLIENT EXPERIENCE				
Kevin Moore	Manager	kmoore@aatx.com	3521	(254) 297-2105
Mendee Moore	Supervisor	mmoore@aatx.com	3528	
Liz Upshaw	Supervisor	eupshaw@aatx.com	3517	
Anselmo Mondragon	Spanish CSR	amondragon@aatx.com	3260	
PREMIUM ACCOUNTING				
Jimmy Weatherby	Manager	jweatherby@aatx.com	3394	(254) 297-2167
Tina Kolar	Direct Deposit Allotment	tkolar@aatx.com	3551	
GENERAL SERVICES & FACILITIES				
Lakeyn Bolfing	Director	lbolfing@aatx.com	3315	(254) 297-2155
Stacie Mizera	Purchasing/Supply Coordinator	smizera@aatx.com	3366	
IT DEPARTMENT				
PC Technical Helpdesk		helpdesk@aatx.com	2808	

Producer contact information

Aetna Health Plans for Individuals, Families and the Self-Employed

www.aetna.com

BROKER SALES SUPPORT UNIT

**1-888-54-AETNA
(1-888-542-3862)**

Monday through Friday
8:30 a.m. to 5:00 p.m. CT/
9:30 a.m. to 6:00 p.m. ET

Fax **1-866-530-8157**

Email address:

**AIMBrokerSupport@
aetna.com**

Mail address:

Aetna Consumer Segment
Broker Support
PO Box 91507
Arlington, TX 76015-0007

SELF SERVICE

**Visit Producer World®
for links to these
convenient business
tools**

- Plan designs, marketing materials, enrollment forms
- Online quoting
- Check underwriting status
- View your Individual Book of Business

Aetna Navigator® and Producer World

Technical support

1-800-225-3375

Monday through Friday
7 a.m. to 9 p.m. ET

Prompt 1 (Aetna Navigator)
Prompt 4 (Producer World)

New business submissions

Underwriting

Mailing address for the
following states:

*AZ, CT, DE, FL, GA, IL, ME, MI,
NV, OH, PA, TX, VA*

Aetna Advantage Plans
PO Box 14381
Lexington, KY 40512-4381
Fax **1-866-892-8396**

Overnight mail address:
AIM

101 Yorkshire Blvd.
Lexington, KY 40509

Underwriting customer
service for applicants only
1-866-898-3267 option #1

BILLING AND ENROLLMENT SERVICES

Include the member's full name and ID number when sending a fax or email to Billing and Enrollment.

Existing business

Off-exchange

1-877-302-3862

Monday through Friday
8 a.m. to 5 p.m. local time

Email address for on-exchange billing and enrollment:

**HCREnroll-Billing
Mailbox@aetna.com**

Email address for billing issues and terminations:

**IndividualEnrollment
andBilling@aetna.com**

Reference "Premium Billing" or "Termination" in the subject line.

**Fax for plan change and termination requests:
1-855-328-3343**

**Fax for recurring EFT and credit card requests:
1-860-975-1253**

Licensing and appointment

1-866-511-2863

Monday through Friday
8:30 a.m. to 5:00 p.m. ET

Fax **1-888-539-7601**

Email address:

LAAU@aetna.com

For email address changes only:

**LAAUaddresschanges@
aetna.com**

Commission inquiries

1-800-622-3435

Monday through Friday
8:00 a.m. to 4:30 p.m. ET

Email address:

BrokerComm@aetna.com

MEMBER CONTACT INFORMATION

Medical

Benefits or claims questions for Aetna Advantage IDs with eight alphanumeric characters (example: BB12345A)

**Off-exchange
1-866-565-1236**

**On-exchange
1-855-586-6960**

Benefits or claims questions for Aetna Advantage IDs with a "W" followed by nine numbers (example: W1234 56789)

1-866-565-1236

**Aetna LeapSM Plan
Member Services
1-844-241-0208**

Claims address

Aetna
PO Box 981106
El Paso, TX 79998-1106

Dental

1-877-238-6200

Prompt 1 (Dental plan member)

Claims address

Aetna
PO Box 14094
Lexington, KY 40512-4094

Pharmacy

**1-800-AETNA-RX
(1-800-238-6279)**

Prompt 2 (Member or calling on behalf of a member)

Claims address

Aetna Pharmacy
Management
PO Box 398106
Minneapolis, MN
55439-8106

**Mail-order drug
1-866-612-3862**

Ordering address

Aetna Rx Home Delivery
PO Box 417019
Kansas City, MO
64179-9892

To track and order Rx refills:

**www.aetna
rxhomedelivery.com**

Other resources

Aetna Navigator

Check claims, balances and benefits. Explore discount programs and Take Action On Your HealthSM, all on Aetna Navigator.

www.aetna.com

DocFind[®]

**www.aetna.com/docfind/
custom/advplans**

Informed Health[®] Line

24-hour nurse help line
1-800-556-1555

Vision

Call for your closest eye care provider
1-800-793-8616

Vital Savings by Aetna[®]

**1-877-MYVITAL
(1-877-698-4825)**

www.vitalsavings.com

This information is intended for brokers only. Aetna Health Plans for Individuals, Families and the Self-Employed are underwritten by Aetna Life Insurance Company or Aetna Health Inc. (together, "Aetna").

www.aetna.com

©2016 Aetna Inc.
13.03.076.1 M (2/16)

The Aetna logo consists of the word "aetna" in a lowercase, teal-colored, sans-serif font. A registered trademark symbol (®) is located at the top right of the letter "a".

Aetna Senior Supplemental Insurance*

Home office directory - Medicare Supplement

This directory also applies to: Accendo Insurance Company part of the CVS Health® family of companies and Aetna affiliate

New Business

Hours:
M-F 7:00 AM-5:00 PM CT

Phone: (866) 272-6630 option 3
Fax: (877) 380-2777 (only for applications using EFT)
Email:** AetSSINewBusiness@aetna.com

Make all checks payable to the appropriate underwriting company

Mail new apps paying by check to:
Aetna Senior Supplemental Insurance
P.O. Box 14399
Lexington, KY 40512-9700

If sending by courier:

Xerox
Attention: Aetna Senior Supplemental Insurance
699 S. Keeneland Drive
Richmond, KY 40475

Underwriting

Hours:
M-F 8:00 AM-5:00 PM CT

Phone: (866) 272-6630 option 4
Fax: (855) 411-9633
Email:** AetSSIUnderwriting@aetna.com

Case Management

Hours:
M-F 7:30 AM-5:00 PM CT

Fax: (855) 447-0391
Fax only documents that a case manager specifically requests

Policyholder Services

Hours:
M-F 7:00 AM-7:00 PM CT

Phone: (866) 272-6630 option 5
(TTY/TDD: 711)

Fax: (855) 291-0553
Email:** AetSSIPHS@aetna.com

Mailing Address for **RENEWAL PREMIUMS ONLY**

Make check payable to the appropriate underwriting company

Reference policyholder name and policy number on all checks and correspondence

ACI	CLI	AHLC
c/o Bank of America Lockbox Services P.O. Box 281067 Atlanta, GA 30384-1067	<i>For policies processed after 6/2010</i> c/o Bank of America Lockbox Services P.O. Box 742179 Atlanta, GA 30374-2179	Aetna Health and Life Insurance Company P.O. Box 742448 Atlanta, GA 30374-2104
GLAIC/GLIC	ACC/AHIC/All other policyholder correspondence	
Medicare Supplement Premiums P.O. Box 741803 Atlanta, GA 30374-1803	Aetna Senior Supplemental Insurance P.O. Box 14770 Lexington, KY 40512-4770	

Claims

Hours:
M-F 7:00 AM-5:00 PM CT

Phone: (866) 272-6630 option 5, 2, 1
Fax: (855) 482-7876
Email:** AetSSICOMP-Claims@aetna.com

(insert name of underwriting company)
P.O. Box 14770
Lexington, KY 40512-4770

Aetna Senior Supplemental Insurance*

Home office directory - Final Expense

This directory also applies to: Accendo Insurance Company part of the CVS Health® family of companies and Aetna affiliate

New Business

Hours:
M-F 7:00 AM-5:00 PM CT

Make all checks payable to the appropriate underwriting company

Phone: (877) 538-2759 option 2
Fax ALL applications (EFT and Direct Bill): (877) 302-3304
Email:** AetSSINewBusiness@aetna.com

Mail check and Final Expense payment form (do not include the application) to:
Aetna Senior Supplemental Insurance
P.O. Box 14399
Lexington, KY 40512-9700

If sending by courier:
Xerox
Attention: Aetna Senior Supplemental Insurance
699 S. Keeneland Drive
Richmond, KY 40475

Underwriting/Case Management

Hours:
M-F 7:30 AM-5:00 PM CT

Phone: (877) 538-2759 option 2
Fax: (877) 302-3304

Only fax documents that a case manager specifically requests

Telephone Interview (Jet Pre-Approval)

Hours:
M-F 7:00 AM-9:00 PM CT
Sat: 9:00 AM-3:00 PM CT

Phone: (877) 538-2759 option 1 (point of sale only)

Not applicable for Accendo Final Expense

Policyholder Services

Hours:
M-F 7:00 AM-7:00 PM CT

Make check payable to the appropriate underwriting company

Reference policyholder name and policy number on all checks and correspondence

ACI/CLI
Phone: (866) 272-6630 option 5
(TTY/TDD: 711)
Fax: (855) 291-0553
Email:** AetSSIPHS@aetna.com

ACC
Phone: (866) 951-0653
Fax: (833) 659-1166
Email:** AetSSIPHS@aetna.com

Mailing Address for **RENEWAL PREMIUMS ONLY**

Bank of America Lockbox Services
P.O. Box 281067
Atlanta, GA 30384-1067

All other policyholder correspondence:

ACI/CLI
P.O. Box 14770
Lexington, KY 40512-4770

ACC
P.O. Box 14795
Lexington, KY 40512

Claims

Hours:
M-F 7:00 AM-5:00 PM CT

ACI/CLI
Phone: (866) 272-6630 option 5, 2, 3
Fax: (855) 829-4026
Email:** AetSSICOMP-Claims@aetna.com

ACI/CLI Final Expense
P.O. Box 680579
Franklin, TN 37068-9923

ACC
Phone: (866) 951-0653
Fax: (833) 659-1166
Email:** AetSSICOMP-Claims@aetna.com

ACC Final Expense
P.O. Box 14795
Lexington, KY 40512

Aetna Senior Supplemental Insurance*
Home office directory - Complementary products

Dental, Vision and Hearing

Policyholder services

Hours:
M-F 7:00 AM-7:00 PM CT

Phone: (866) 272-6630 option 5

Claims

Hours:
M-F 7:00 AM-7:00 PM CT

Phone:

(866) 272-6630 option 5, 2, 2

Fax: (972) 335-1349

Email:**
AetnaClaims@careington.com

Address: P.O. Box 60
Frisco, TX 75034

All other CLI complementary products

New Business

Hours:
M-F 7:00 AM-5:00 PM CT

Make all checks payable to the appropriate underwriting company

Phone: (866) 272-6630 option 3

Fax (only applications using EFT):
(877) 380-2777

Email:** AetSSINewBusiness@aetna.com

Mail check to:
Aetna Senior Supplemental Insurance
P.O. Box 14399
Lexington, KY 40512-9700

If sending by courier:

Xerox
Attention: Aetna Senior Supplemental Insurance
699 S. Keeneland Drive
Richmond, KY 40475

Underwriting

Hours:
M-F 8:00 AM-5:00 PM CT

Phone: (866) 272-6630 option 4

Fax: (855) 411-9633

Email:** AetSSIUnderwriting@aetna.com

Case Management

Hours:
M-F 7:00 AM-5:00 PM CT

Fax: (855) 447-0391

When requested, fax outstanding documents needed for policy issue

Telephone Interview

Hours:
M-F 7:00 AM-8:00 PM CT
Sat 9:00 AM-3:00 PM CT

Phone: (866) 272-6630 option 2

Policyholder Services

Hours:
M-F 7:00 AM-7:00 PM CT

Phone: (866) 272-6630 option 5
(TTY/TDD: 711)

Fax: (855) 291-0553

Email:** AetSSIPHS@aetna.com

Cancer Plus policies
processed after 6/16/2013

All other
complementary policies
processed after 10/27/13

For all policies processed
prior to these dates:

Mailing address for **RENEWAL PREMIUMS ONLY:**

Make check payable to the appropriate underwriting company

Reference policyholder name and policy number on all checks and correspondence

Continental Life Insurance
Company of Brentwood,
Tennessee

P.O. Box 742179
Atlanta, GA 30374-2179

Continental Life Insurance
Company of Brentwood,
Tennessee

P.O. Box 742179
Atlanta, GA 30374-2179

Continental Life Insurance
Company of Brentwood,
Tennessee

P.O. Box 791369
Baltimore, MD 21279-1369

Send all other policyholder correspondence to:

Continental Life Insurance Company of Brentwood, Tennessee
P.O. Box 14770
Lexington, KY 40512-4770

Claims

Hours:
M-F 7:00 AM-5:00 PM CT

Phone: (866) 272-6630 option 5, 2, 4

Fax: (855) 829-4026

Email:** AetSSICOMP-Claims@aetna.com

Aetna Senior Supplemental Insurance

P.O. Box 14862

Lexington, KY 40512

Aetna Senior Supplemental Insurance*

Home office directory

Agent Contracting

Hours:
M-F 8:00 AM-5:00 PM CT

Phone: (866) 272-6630 option 1
Fax: (859) 425-5211 (new agent appointments)
Fax: (855) 571-3847 (change requests/additional documentation)

- State appointments
- Copy of existing commission schedule (post contracting)
- LIMRA certifications
- EFT requests for commissions
- Address/email changes

Aetna Senior Supplemental Insurance
c/o Contracting
1021 Reams Fleming Blvd
Franklin, TN 37064

Commissions

Hours:
M-F 8:00 AM-5:00 PM CT

Phone: (866) 272-6630 option 1
Fax: (855) 816-4835
Email:** AetSSICommissions@aetna.com

- Commission questions
- Commission statements
- 1099 forms

Aetna Senior Supplemental Insurance
c/o Commissions
1021 Reams Fleming Blvd
Franklin, TN 37064

Agent Services (Sales)

Hours:
M-F 8:00 AM-5:00 PM CT

Phone: (866) 272-6630 option 1
Fax: (855) 690-0893
Email:** AetSSIinformation@aetna.com

- Sales supplies
- Rates
- Product training
- Webinar reservations
- Commission advancing requests
- Aetna Quote & Enroll/E-App support
- Contracting documents
- Commission schedules

Aetna Senior Supplemental Insurance
c/o Agent Services
1021 Reams Fleming Blvd
Franklin, TN 37064

Agent Website Technical Support

Hours:
M-F 8:00 AM-5:00 PM CT

www.aetnaseniorproducts.com
(Website available 24 hours)
For technical assistance
(including registering your username and password):
Phone: (800) 587-5139
Email:** AetSSIWebAssist@aetna.com

- Online registration
- Password resets
- Login assistance
- Aetna Quote & Enroll/E-App support

*All products underwritten by American Continental Insurance Company (ACI), Continental Life Insurance Company of Brentwood, Tennessee (CLI), both Aetna companies. Medicare Supplement underwritten by Aetna Health Insurance Company (AHIC), Aetna Health and Life Insurance Company (AHLIC), both Aetna companies, and Accendo Insurance Company (ACC), Part of the CVS Health® family of companies and Aetna affiliate.

Do not use email to send applicant or policyholder information unless it is encrypted. It is possible that your e-mail communication may be accessed or viewed inappropriately by another Internet user while in transit to us. You can send information securely via **aetnaseniorproducts.com.

Aetna Senior Supplemental Insurance Sales management team

WEST



Tony Clark
Regional Vice President

SOUTH



Kevin Moore
Regional Vice President

MIDWEST

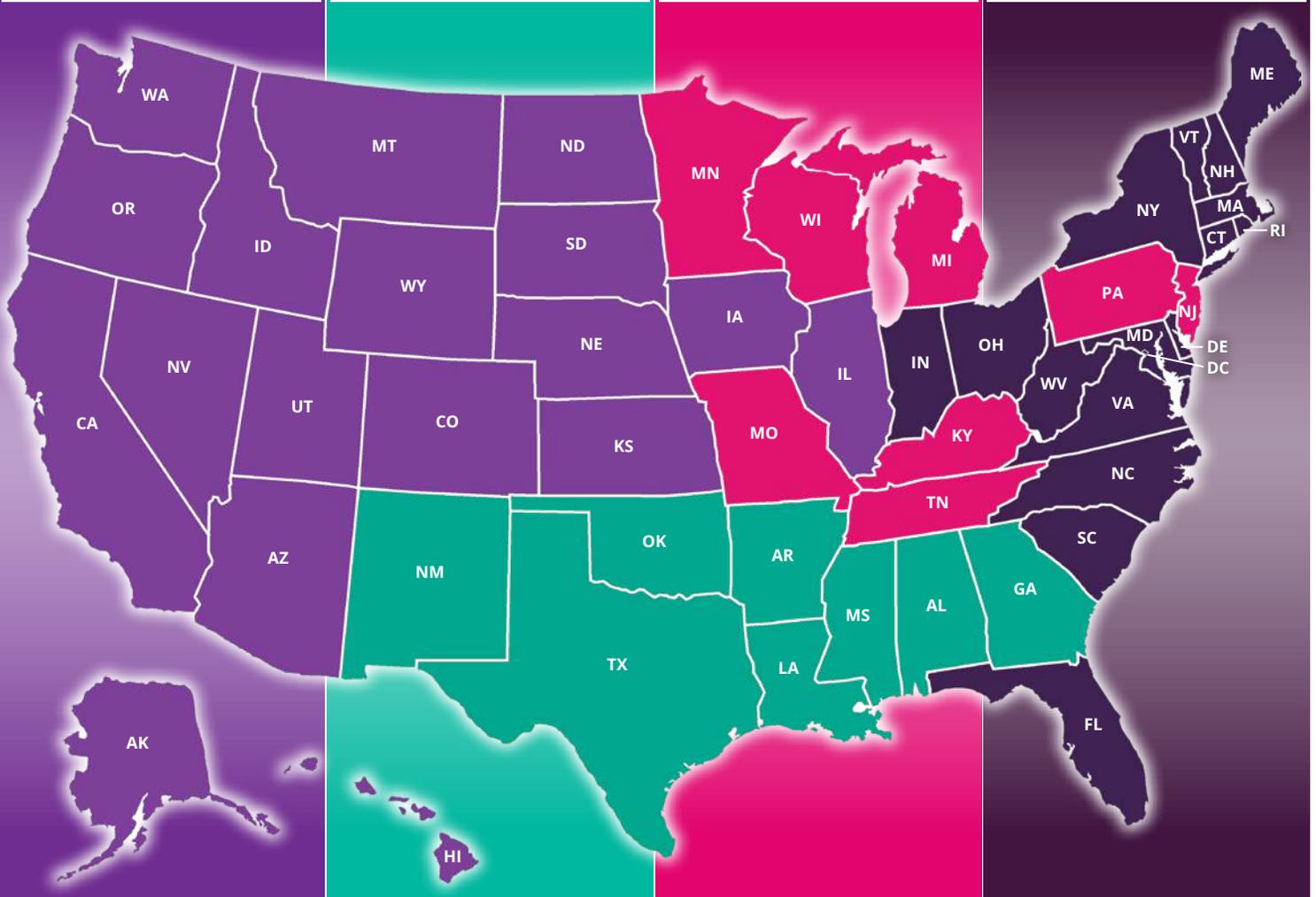


George Pelekanos
Regional Vice President

EAST



Jeff Nasser
Regional Vice President



Dan Memory
Regional Sales Manager



Tonya Addison
Regional Sales Specialist



Justine Sawyers
Regional Sales Manager



Suzanne Guillebeau
Regional Sales Specialist



Rick Huemmer
Regional Sales Manager



Rose Faulkner
Regional Sales Specialist



Paul Ericson
Regional Sales Manager



Colleen Trayser
Regional Sales Specialist

WEST

AK, AZ, CA,
CO, HI, IA,
ID, IL, KS,
MT, ND, NE,
NV, OR, SD,
UT, WA, WY

Regional
Vice President

Tony Clark

Tony.Clark@aetna.com
804-381-1068

Regional
Sales Manager

Dan Memory

MemoryD@aetna.com
224-813-2260

Regional
Sales Specialist

Tonya Addison

AddisonT@aetna.com
959-299-4659

SOUTH

AL, AR,
GA, LA,
MS, NM,
OK, TX

Regional
Vice President

Kevin Moore

MooreK7@aetna.com
615-927-1089

Regional
Sales Manager

Justine Sawyers

SawyersJ@aetna.com
214-789-4284

Regional
Sales Specialist

Suzanne Guillebeau

GuillebeauS@aetna.com
959-299-4655

MIDWEST

KY, MI,
MN, MO,
NJ, PA,
TN, WI

Regional
Vice President

George Pelekanos

George.Pelekanos@aetna.com
615-785-2599

Regional
Sales Manager

Rick Huemmer

HuemmerR@aetna.com
615-917-2873

Regional
Sales Specialist

Rose Faulkner

Rose.Faulkner@aetna.com
615-807-7515

EAST

CT, DC, DE,
FL, IN, MA,
MD, ME, NC,
NH, NY, OH,
RI, SC, VA,
VT, WV

Regional
Vice President

Jeff Nasser

NasserJ@aetna.com
317-910-2830

Regional
Sales Manager

Paul Ericson

EricsonP@aetna.com
615-202-9731

Regional
Sales Specialist

Colleen Trayser

TrayserC2@aetna.com
615-807-7517

Agent services team

866-272-6630

Aetna Health and Life Insurance Company
Aetna Health Insurance Company
American Continental Insurance Company
Continental Life Insurance Company of Brentwood, Tennessee

Accendo Insurance Company

Part of the CVS Health® family of companies and Aetna affiliate
Policy administered by Aetna Life Insurance Company and its affiliates

For product availability, go to aetnaseniorproducts.com



Customer Service

Customer Service: 800-255-2702

Website: www.aig.com/Connex

Option 1 for New Business
Option 2 for Customer Service

Option 3 for Licensing
Option 4 for Commissions

Option 5 for Winflex Support
Option 6 for Connex Support

New Business Support

Fax & Email Submissions:

Applications	800-915-9937	NewApp@aig.com
Pending Requirements	800-915-9934	PartnersGroupPendingReqs@aig.com
Delivery Requirements	877-713-6354 or 877-713-6355	PartnersGroupDeliveryReqs@aig.com
Quick Quote	N/A	QuoteAG@aglife.com

For Mailing Addresses: See our [Where to Submit Business](#) guide

Underwriting Contacts

Underwriting Quick Quote Hotline: 877-462-8829

<p>Leanna Bronner-Halfhill * Underwriter Direct: 713-831-8880 leanna.bronnerhalfhill@aig.com</p>	<p>Julene Coffman * Underwriter Direct: 217-541-8274 julene.coffman@aig.com</p>	<p>Dolly Ferrell * Underwriter Direct: 713-831-8868 dolly.ferrell@aig.com</p>	<p>Liann Gale * Underwriter Direct: 713-831-2245 liann.gale@aglife.com</p>
<p>Karen Gibson Underwriter Direct: 713-831-3442 karen.gibson@aig.com</p>	<p>Jeremy Lutz * Underwriter Direct: 713-831-8311 jeremy.lutz@aglife.com</p>	<p>Barbara Michaud Underwriter Direct: 713-831-8872 barbara.michaud@aig.com</p>	<p>Barbara Robinson Underwriter Direct: 713-342-1657 barbara.robinson@aig.com</p>
<p>Anna Blumberg Underwriter Direct: 713-831-2061 anna.vaneaton@aig.com</p>	<p>Adam Wigfield * Underwriter Direct: 713-831-2367 adam.wigfield@aig.com</p>	<p>Steve Tomczyk * Managing Director Direct: 713-831-4104 steve.tomczyk@aig.com</p>	

* Foreign National and Non Foreign National Underwriting Contacts

Case Relationship Management Contacts

CRM Case Contacts
[Regional CRM Contacts](#)

Brady Petersen
Associate Director
Direct: 713-831-2745
brady.petersen@aig.com

Elizabeth Metcalf
Vice President
713-831-2739
elizabeth.metcalf@aig.com

Licensing, Contracting & Commissions

Email Submissions:

New Agent Appointment Submission	GetAppointed2@aig.com
Commissions	CommissionResearch@aig.com
Contract Maintenance	LCMaintenance@aig.com
Contract Termination	LCTermination@aig.com
Servicing Agent Changes	ServicingAgent_Changes@aig.com

FOR FINANCIAL PROFESSIONAL USE ONLY - NOT FOR PUBLIC DISTRIBUTION

Policies issued by American General Life Insurance Company (AGL), Houston, TX, and The United States Life Insurance Company in the City of New York (US Life), members of American International Group, Inc. (AIG).

AGLC106419-California REV0522 ©2022 AIG. All rights reserved.

LC&C Mailing Addresses:

Overnight	American General Life Insurance Company - L&C 1050 North Western Street Amarillo, TX 79106	Regular	American General Life Insurance Company P.O. Box 9978 Amarillo, TX 79105-5978
------------------	--	----------------	---

LC&C Key Contacts/Escalations: [PG Sales Map](#)

New Business Key Contacts

Rachel Jaeggi
VP, Head of New Business
Phone: 713-831-4117
Rachel.Jaeggi@aig.com

Chad Smith
Director, GIWL / SIWL
Phone: 346-324-2375
Chad.Smith@aig.com

Brian Campbell
Associate Director, Conversions & Replacements/Exchanges
Phone: 615-426-2357
Brian.Campbell2@aig.com

Replacements/Reg60 & 1035 Exchanges**Requirement Submissions**

Fax: 855-327-4424
Email: ReplReq@aig.com

Replacements & Non-Enhanced Reg60

Requests or questions –
Replacement.Team@aig.com

1035 Exchange & Enhanced Reg60

Requests or questions –
PartnersGroupPendingReqs@aig.com

Escalations –
ReplacementAndExchangeTeam@aig.com

Term Conversions

Email: Term.Conversion.Support@aig.com
** General questions, status, escalations

Conversion eligibility (including available products and rate class)

ConversionEligibility@aig.com

Application Submissions (paperwork only)

ConversionApp@aig.com

Pending Requirement Submission (paperwork only)

ConversionReq@aig.com

Inforce Support

For Inforce tips and turnaround times: See our [Inforce Support](#) guide

Additional Support

Product Knowledge & Case Design	800-358-5753 Option 1	
Illustration Support	800-358-5753 Option 1	
eApplication Assistance	800-358-5753 Option 4	
Annuities Contact & Support Option 1: NB/Sevice Option 2: Sales Desk Option 3: LC&C PH: 888-438-6933	Inquiries – AnnuityServiceCenter@aig.com NB Doc Submission Only - AIGAnnuityService@aig.com	www.aig.com/annuityplaybook
Annuities L&C PH: 888-866-5952	L&C Doc Submission / Inquiries – IMOBGA_PendReport@aig.com	AIG IMO Annuity L&C Contact Map

Policies issued by American General Life Insurance Company (AGL), Houston, TX, except in New York, where issued by The United States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and US Life are responsible for financial obligations of insurance products and are members of American International Group, Inc. (AIG). Guarantees are backed by the claims-paying ability of the issuing insurance company. Products may not be available in all states and product features may vary by state. Please refer to your policy.

FOR FINANCIAL PROFESSIONAL USE ONLY. NOT FOR PUBLIC DISTRIBUTION.

AGLC106419-California REV0522 ©2022 AIG. All rights reserved.



Member directory

Agent Onboarding, Maintenance, Supplies and Market Support

Phone: (833) 504-0334

Hours:

Mon -Thu: 7:30 AM-4:00 PM CST

Fri: 7:30 AM - 11:00 AM CST

New Business

Phone: (833) 504-0334

Hours:

M-F 7:30 AM-7:00 PM CST

Fax: (833) 380-2777

(only for applications using EFT)

Make all checks payable to
The American Home Life
Insurance Company

Mail new apps paying by check to:

The American Home Life Insurance Company
P.O. Box 14399
Lexington, KY 40512-9700

Case Management

Hours:

M-F 7:30 AM-5:00 PM CST

Fax: (855) 447-0391

Policyholder Services

Hours:

M-F 8:00 AM-5:00 PM CST
(agents)

M-F 7:00 AM-7:00 PM CST
(policyholders)

Medicare Supplement

Phone: (833) 504-0334 (agents)

Phone: (833) 504-0334 (policyholders)

Fax: (855) 291-0553

Final Expense

Phone: (800) 259-0468 (agents)

Phone: (800) 259-0468 (policyholders)

Fax: (833) 526-0522

Make check payable to the
appropriate
underwriting company
Reference policyholder name
and policy number on all
checks and correspondence

Mailing Address for RENEWAL PREMIUMS ONLY

Medicare Supplement/Final Expense

The American Home Life Insurance Company
PO Box 14109
Lexington, KY 40512-4109

Claims

Hours:

M-F 7:00 AM-5:00 PM CST

Medicare Supplement

Phone: (833) 504-0334 (agents)

Phone: (833) 504-0334 (policyholders)

Fax: (859) 280-3617

Final Expense

Phone: (800) 259-0468 (agents)

Phone: (800) 259-0468 (policyholders)

Fax: (833) 526-0522

The American Home Life Insurance Company
PO Box 14109
Lexington, KY 40512-4109

The American Home Life Insurance Company
PO Box 534
Brownwood, TX 76804



Athene Annuity NY Contact Us

*Annuities issued by
Athene Annuity & Life Assurance Company of New York
Effective January 1, 2016*

*For Producer Use Only.
Not to be used with the offer or sale of annuities.*

For ATHENE MaxRate® MYGA products in New York

Sales Assistance **Phone:** 855-4-ATHENE (855-428-4363)
Email: marketingNY@athene.com

New Business and Client Service Center Information For Agents inquiring about new business and in-force business
Phone: 855-4-ATHENE
E-mail: agentsupport@athene.com
Fax: 770-690-1985

You may also access the online policy management for these contracts at www.AtheneAnnuityNY.com/producer.

Regulation 60 Requests We will accept a fax for the initial Regulation 60 paperwork but require originals in the application package.

Fax: 770-690-1985

Regular Mail:
Athene Annuity & Life Assurance
Company of New York
PO Box 725449
Atlanta, GA 31139

Express/Overnight Delivery:
Athene Annuity & Life Assurance
Company of New York
6425 Powers Ferry Road, Suite 300
Atlanta, GA 30339

Licensing & Contracting **Phone:** 855-4-ATHENE
E-mail: producer@athene.com
Fax: 888-232-1490

Commissions **Phone:** 855-4-ATHENE
E-mail: commissions@athene.com

Current Interest Rates Call **855-4-ATHENE** or go to www.AtheneAnnuityNY.com/producer and click on **Products & Rates**.

Hours Monday - Friday, 8:30 a.m. to 5 p.m. (EST)

Continued



Website: www.AtheneAnnuityNY.com/producer
Sales Desk: 855-4-ATHENE

Annuities issued by Athene Annuity & Life Assurance Company of New York, Nyack, NY.

For retired Presidential Life products and commissions

Annuity Customer Care & Commissions

Customer Care Center

Service forms are available for download at: www.AtheneAnnuityNY.com. Click **Support** and then **Forms**.

Phone: 800-926-7599

Fax: 855-893-5662

For Annuity In-Force:

Regular Mail:

Athene Annuity & Life Assurance
Company of New York
PO Box 19031
Greenville, SC 29602-9031

Express/Overnight Delivery:

Athene Annuity & Life Assurance
Company of New York
2000 Wade Hampton Blvd.
Greenville, SC 29615-9031

Flexible Premium Deposits (lockbox):

Athene Annuity & Life Assurance
Company of New York
PO Box 602910
Charlotte, NC 28260-2910

Life Customer Care & Commissions

Life Services

Service forms are available for download at: www.AtheneAnnuityNY.com. Click **Support** and then **Forms**.

Phone: 800-926-7599

Fax: 855-893-5663

For Life In-Force:

Regular Mail

Athene Annuity & Life Assurance
Company of New York
PO Box 19014
Greenville, SC 29602-9014

Express/Overnight Delivery:

Athene Annuity & Life Assurance
Company of New York
2000 Wade Hampton Blvd
Greenville, SC 29615

Premium Payments:

Athene Annuity & Life Assurance
Company of New York
PO Box 602910
Charlotte, NC 28260-2910

Hours

Monday - Friday, 8:30 a.m. to 5 p.m. (EST)



Experience the Power of Collaborative Thinking

F&G's Life Sales Team

You have access to a team of professionals dedicated to helping you grow your life business. This team represents F&G's commitment to providing the support you need to focus on increasing your sales.



Sandy Behymer

Sr. Internal Wholesaler

Sandy.Behymer@fglife.com



Curren Hoff

Sr. Internal Wholesaler

Curren.Hoff@fglife.com

SalesLink Agent Portal



Agent Resource Site



Dedicated Life Sales Support

800.357.8734

Life.Sales@fglife.com

Annuity Sales Support

800-445-6758 Option 1, Option 1

SalesDesk@fglife.com

Life Policyholder Services

800-445-6758 Option 2, Option 3

DeliveryRequirements@fglife.com

*This is an unmonitored email for submission of completed delivery requirement for "no touch" image processing only

Life New Business

800-445-6758 Option 2, Option 1

LifeCaseMgmt@fglife.com

Contracting & Commissions

800-445-6758 Option 4

Contracting.Support@fglife.com or Commissions.Support@fglife.com

"F&G" is the marketing name for Fidelity & Guaranty Life Insurance Company issuing insurance in the United States outside of New York. Life insurance and annuities issued by Fidelity & Guaranty Life Insurance Company, Des Moines, IA.

in @ f X fglife.com

For financial professional use only. Not for use with the general public.
Fidelity & Guaranty Life Insurance Company

ADV 3867 (04-2023)
Rev. 08-2023 23-1052



Experience the Power of Collaborative Thinking

F&G's Internal Life Sales Team

Your F&G Internal Life Sales Team is here to help you with case designs and questions on F&G FIUL products.



Emily Scanlon

AVP, Internal Sales
- Life

Emily.Scanlon@fglife.com



Annie Bentley

Manager, Internal
Sales

Annie.Bentley@fglife.com



Katie Miller

Internal
Wholesaler

Katie.Miller@fglife.com



Frank Nobile

Internal
Wholesaler

Frank.Nobile@fglife.com



Racquel Moore

Internal
Wholesaler

Racquel.Moore@fglife.com



Monika Boyer

Internal
Wholesaler

monika.boyer@fglife.com



Jemileth Aguilar

Internal
Wholesaler

jemi.aguilar@fglife.com



Glen Gomez

Internal
Wholesaler

glen.gomez@fglife.com

Phone
800.357.8734

Email
Life.Sales@fglife.com

Hours
8 a.m. - 5 p.m. CT, Monday through Thursday and 8 a.m. - 2 p.m. CT on Friday

"F&G" is the marketing name for Fidelity & Guaranty Life Insurance Company issuing insurance in the United States outside of New York. Life insurance and annuities issued by Fidelity & Guaranty Life Insurance Company, Des Moines, IA.

[in](#) [@](#) [f](#) [X](#) fglife.com

For financial professional use only. Not for use with the general public.
Fidelity & Guaranty Life Insurance Company

ADV 3867 (04-2023)
Rev. 08-2023 23-1052

Contact Us

Foresters Sales Support:

1-866-466-7166 Fax: 1-877-329-4631

Option 1: Sales Support & Marketing

Pre-sales support, product information, and marketing material.

Hours: Monday - Friday 8:30am - 6:00pm ET

Option 2: New Business, Underwriting & Risk Assessment.

For case specific inquiries.

nbunewbiz@foresters.com

Hours: New Business - Monday - Friday 9:00am - 6:00pm ET

Hours: Underwriting - Monday - Friday 9:00am - 7:30pm ET

Option 3: Payment Services

For banking and draw date changes, change your method of payment or payment frequency, and to request a withdrawal.

Hours: Monday - Friday 8:00am - 8:00pm ET

Option 4: Contracting

Contracting Paperwork - ezcontract@foresters.com

Correspondence - AgencyAdmin@foresters.com

Hours: Monday - Friday 8:00am - 6:00pm ET

Option 5: Compensation

Hours: Monday - Friday 8:00am - 6:00pm ET

Option 6: Claims

To report a new claim or check on the status of a pending claim.

Hours: Monday - Friday 8:00am - 6:00pm ET

Option 7: Inforce Business

Hours: Monday - Friday 8:00am - 8:00pm ET

Option 8: Contact information

Option 9: Company Directory

Mailing Address:

New applications and requirements, Inforce Premium Payment checks and/or Loan Repayment checks may be mailed to the address below or faxed to Foresters:

Regular U.S. postal mail:

Foresters Financial
PO BOX 179
Buffalo NY 14201 - 0179

Courier/ Overnights:

Foresters Financial
C/O Frontier Distributing
Attention: New Business
2221 Kenmore Ave
Suite 108
Buffalo NY 14207-1306

Member Information

If your clients have a member inquiry, call:

- Member Benefits: 1-800-444-3043
- General member inquiries: 1-800-828-1540

Foresters products and riders may not be available or approved in all states and are subject to eligibility requirements, underwriting approval, limitations, contract terms and conditions and state variations. Refer to the applicable Foresters contract for your state for these terms and conditions.

Underwritten by The Independent Order of Foresters

For Producer use only. Not for use with the public.

418293 US 12/19



**Guarantee Trust Life
Department/Management Contact
Information**

General Contact Information

Corporate Web Address: www.gtlic.com

Mailing Address: 1275 Milwaukee Ave. Glenview, IL 60025

Departments

Sales Support

agency@gtlic.com

Tel: 800-323-6907

Fax: 847-699-0895

Claims

Tel: 800-338-7452

Fax: 847-904-5928

Commissions

commissions@gtlic.com

Tel: 800-323-6907

Fax: 847-699-0636

Customer Service

pos@gtlic.com

Tel: 800-338-7452

Fax: 847-699-2551

Licensing

Tel: 800-323-6907

Fax: 847-699-9207

New Business/Underwriting

und@gtlic.com

Tel: 800-635-1993

Fax: 847-699-8493 or 847-699-9937

Management

Sales/Marketing/Licensing

Carl Leader – VP, Life & Health clead@gtlic.com 847-904-5455

Eric Schmidt – Manager, Sales Admin/Product Development eschm@gtlic.com 847-904-5362

Patricia Kasprzyk – Manager, Sales Support/licensing pkasp@gtlic.com 847-904-5564

New Business/Underwriting Department

Jeff Frericks – VP, New Business/Underwriting jfrer@gtlic.com 847-460-4785

Kanne Knezz – Manager, New Business kknez@gtlic.com 847-904-5341

David Rzany – Supervisor, Health drzan@gtlic.com 847-904-5445

Compliance

Terri Tyc, VP Compliance ttyc@gtlic.com 847-460-4783

Claims

Lesley Hanslope VP Claims lhans@gtlic.com 847-460-4773

Commission Accounting

Brian Bowman-Manager Commissions bbowm@gtlic.com 847-904-5348

Customer Service

Joy Kunach -Manager CSU jkuna@gtlic.com 847-904-5565

Contact Information

Department	Purpose	Email	Phone
<i>1st point of Contact Customer Service</i>	Policy Inquiry Billing Inquiry Application Inquiry Commission Inquiry Changes/Updates		800-428-4947 – Agents Call 800-253-3074 – Clients Call
Fax	Paper Applications		877-608-4634
Licensing	Appointment Status	glic.appointment.status@gerberlife.com	
Underwriting	Underwriting Inquiry	glic.agency.underwriting@gerberlife.com	
Pre-Sales Support	General Product Information Webinar Requests	gerberlifeagency-sales@gerberlife.com	

*All emails will be responded to within a 48 hour time period.

Rev. 11/19

Kansas City Life Insurance Company Premium Payments and Operations Contact Information

Agent toll-free number: 800-572-2467

Overnight shipments via FedEx or UPS, use
3520 Broadway Blvd.
Kansas City, MO 64111-2502
816-753-7000

Regular postal service mail **IS** accepted at the
street address.



KANSAS CITY LIFE

Please use the appropriate lock box P.O. number for Inforce premium payments to avoid delays.

Inforce Fixed Premiums (Payments only)

Inforce premium payments go through a lock box system and are processed directly by the bank. Once the check has been cashed, the money will be credited on www.kclife.net. Payments sent *anywhere else* will be delayed because they will still be routed to lock box for processing. *Deposits in addition to normal premiums for life and annuity policies should also be sent to lock box.*

Kansas City Life Insurance Company
P.O. Box 211217
Kansas City, MO 64121-1217

Inforce Variable Premiums (Payments only)

Inforce premium payments go through a lock box system and are processed directly by the bank. Once the check has been cashed, the money will be credited on www.kclife.net. Payments sent *anywhere else* will be delayed because they will still be routed to lock box for processing. *Deposits in addition to normal premiums for life and annuity policies should also be sent to lock box.*

Kansas City Life Insurance Company
P.O. Box 219363
Kansas City, MO 64121-9363

New Business Department

(Initial premiums accepted here. Initial Premium payments sent *anywhere else* will be delayed.)

Applications and documents, delivery receipts, signed illustrations, etc.

Fax: 877-295-3806

**Kansas City Life Insurance Company
(USPS mail only – No UPS or FedEx)**
P.O. Box 219428
Kansas City, MO 64121-9428

Customer Services Department (DO NOT send payments here)

General inquiries, changes of addresses, beneficiaries, premium/billing questions or surrenders and loans.

Fax: 816-931-3585
customerservice@kclife.com

Kansas City Life Insurance Company
P.O. Box 219272
Kansas City, MO 64121-9272

**Pension & Tax Administration
Kansas City Life Insurance Company**
P.O. Box 219364
Kansas City, MO 64121-9364

Lafayette Life Insurance Company - Contact Sheet

Main phone: 800-243-6631

Fax: 888-558-9329

Call center hours: Mon-Thu 8:15am-5:00pm ET; Fri 8:15am-4:45pm ET

Mailing address: 400 Broadway, Cincinnati, OH 45202-3341

Website contact page: westernsouthern.com/lafayette/contact

Financial Representative Portal: partner.westernsouthern.com (register/login)

CONTACT INFORMATION



Liberty Bankers Life
Insurance Company



Agent Support

1-844-770-2400

- Sales and Marketing
- Commissions
- Supplies
- Product Availability



New Business

1-844-770-2400

- New Business Status
- Underwriting
- Claims
- Fax App Submission

1-855-493-9242

Mailing Address

Administrative Office
P.O. Box 15357
Clearwater, FL 33766-5357

Overnight/Express Address

2650 McCormick Drive
Clearwater, FL 33759

Claims Address

P.O. Box 14707
Clearwater, FL 33766-4707



Policyholder Services

1-844-770-2400



Technology

1-844-550-1200

- eApp
- eContracting
- AgentXcelerator (<https://aiatpa.agentxcelerator.com/>)

A woman with dark curly hair, wearing a brown blazer over a dark green shirt, is smiling and talking on a black mobile phone. She is sitting at a desk in an office, looking at a large computer monitor. The background shows a blurred office environment with a window and some office equipment.

MUTUAL OF OMAHA CONTACT GUIDE

For Producers, Brokers and Advisors



This comprehensive guide for Mutual of Omaha producers, brokers and advisors provides relevant contact information to easily find the right department for specific needs.

Contents

Producer Management — Contracts and Appointments

Sales Support Unit — Income and Wealth Planning, Senior Health Solutions

Underwriting Support — New Business, Senior Health Solutions

Technical Support

Compensation Call Center

Policyowner Services Operations Teams — Life, Health and Annuity

Claims — Supplemental Health, Individual Life and Annuity

Agent of Record Changes

Producer Management: Contracts and Appointments

The Producer Management Team reviews contract requests for producers, brokers and advisors seeking to sell, solicit or negotiate products on behalf of Mutual of Omaha. This process ensures that producers possess the appropriate licenses and certifications mandated by the state for selling products. Additionally, the department coordinates the development of compensation schedules and hierarchies for these individuals. However, it is important to note that the department does not issue compensation.



Assistance Producer Management Can Provide:

- Requests for status on a contracting submission or background check
- Requests for status on a state appointment addition
- Status inquiries on the "ready to sell" designation for long-term care (LTC) and annuity products
- Guidelines for anti-money laundering (AML), LTC and annuity training
- Requests for contracting documents, applicable only to Managing General Agents (MGAs) (all others should be directed to their respective MGAs)
- Requests for producer demographic information (we are unable to update client addresses)
- Requests to change the mailing address for Medicare Supplements (we are unable to update addresses for other product lines)
- General inquiries about the contracting and appointment process with Mutual of Omaha
- Submissions for deceased agents or beneficiaries pertaining to writing agents
- Requests for commission assignments or changes in payee information
- Information regarding direct deposit arrangements



Producer Management Is Unable to Provide Assistance With:

- Supplies
- Client application status (New Business)
- Any client requests
- Serving policies
- Compensation, compensation statements or 1099 questions
- Illustrations
- Product knowledge
- Sales Profession Access (SPA) assistance
- Producer of record changes
- Non-resident application license requirements
- LTC training vendors
- Million Dollar Roundtree



Contact Information

Monday-Friday, 8 a.m. to 4:30 p.m. CST

Main Phone Number: 1-800-867-6873

Email: contractsandappointments@mutualofomaha.com



Income and Wealth Planning (IWP) Sales Support Unit

The IWP Sales Support Unit can assist producers, brokers and advisors with pre-sale inquiries related to a diverse range of products, including life insurance, accidental death insurance, long-term care (LTC), Critical Illness Insurance and annuities. IWP Sales Support facilitates inbound calls through dedicated toll-free lines specifically for Mutual of Omaha's Sales Professionals.



Assistance IWP Sales Support Can Provide:

- Illustrations and quotes for Mutual of Omaha's individual health and life products, including accidental death, LTC, Critical Illness, all life products and annuities
- An overview of all individual products offered by Mutual of Omaha
- Winflex Web approvals, registration and quoting software knowledge
- Generating Winflex illustrations in accordance with case design specifications
- Sales Professional Access (SPA) regarding registration, navigation, locating forms and materials and basic guidance
- Verification on the accuracy of applications, brochures, forms, and marketing materials for client meetings
- Inquiries related to life insurance iGo e-App (for technical support issues, direct questions to iPipeline)
- Indexed universal life (IUL) insurance re-proposals exclusively
- Help in obtaining reports such as the book of business, commissions, persistency and placement
- Producer and brokerage supply-related inquiries, including calls and emails requesting materials necessary for their business with Mutual of Omaha



IWP Sales Support Is Unable to Provide Assistance With:

- Salesforce
- Client application status (New Business)
- Any client request — our phone lines are for producers only
- Inforce policies
- Re-proposals on a policy (also known as in force policies) on all products except IUL
- Compensation questions, Agent of Record changes
- Underwriting (risk assessment on products, health related questions)
- Contracts and appointments
- Service Desk (Technical Support) technical, website, system issues
- Field relations (agent terminations or complaints)
- Marketer/Producer contest stats
- Assigning or suggesting a new agent to orphan policies
- Providing "term conversion" quotes once producer has received approval from Underwriting (email: SMB-ConversionCM@mutualofomaha.com)
- Information on Guaranteed Insurability Rider (GIR) requests



Contact Information

Monday-Friday, 8 a.m. to 5 p.m. CST

Main Phone Number: 1-800-693-6083

Advisors Phone Number: 1-887-617-5589

Fulfill overprint requests: overprint@mutualofomaha.com

To fulfill marketing supply requests, email fulfillment.services@mutualofomaha.com or call the main phone number listed above.

If you call after hours, our voicemail inboxes are monitored and after hours emails should be directed to sales.support@mutualofomaha.com.

Senior Health Solutions Sales Support Unit

The Senior Health Solutions Sales Support Unit can assist producers, brokers and advisors with various aspects of the sales process specifically for dental and Medicare Supplement (Med Supp) Senior Health Solutions products. Senior Health Solutions Sales Support facilitates inbound calls through dedicated toll-free lines specifically for Mutual of Omaha's Sales Professionals.



Assistance Senior Health Solutions Sales Support Can Provide:

- Quotes and product overview for individual dental and Med Supp products
- Registration and navigation of Sales Professional Access (SPA), also known as the "Mutual of Omaha Website"
- Verifying correct applications, brochures, forms and marketing materials to use in client meetings
- Locating forms and materials on SPA
- Handle supply calls and emails from brokers requesting materials needed for their business with Mutual of Omaha
- Dental and Med Supp electronic application questions



Senior Health Solutions Sales Support Is Unable to Provide Assistance With:

- Salesforce
- Any client request — our phone lines are for producers only
- Issued policies
- Underwriting
- Contracts and Appointments
- Service Desk (Technical Support) website, system issues



Contact Information

Monday-Friday, 8 a.m. to 5 p.m. CST

Email: sales.support@mutualofomaha.com

Agency Phone Number: 877-617-5589

Broker Phone Numbers:

800-693-6083

800-707-6898

402-351-7201

Other Admin Phone Numbers:

Assured: 877-815-4776

Columbian: 866-681-5985

Federal Life: 800-784-5403

Gerber: 877-617-5592

GPM: 866-754-5716

WoodmenLife: 800-890-0349



New Business Underwriting Support

New Business Underwriting Support can provide producers, brokers and advisors information and help regarding the status of pending individual applications, reinstatement requests, initial premiums, cancellations of new business and mode changes (re-issues) within the first year of a policy. Additionally, support can be provided from underwriters and case managers in areas related to life insurance, lump sum payments and accidental death (50AD) products.



Assistance New Business Underwriting Can Provide:

- Status on pending advisor and broker sold life, lump sum and 50AD products
- Assistance with questions on outstanding requirements, required forms, application questions
- Assistance with new business cancels
- Assistance with status on re-instatements after the initial documentation is provided by Policyowner Services
- Triage for risk assessments: determining which areas the call needs to go to, such as Express Life, Fully Underwritten Life (either Brokerage or Advisor)
- Post issue requirements
- Duplicate original policies
- Initial premiums, re-draft on initial premiums
- Help with missing electronic applications



New Business Underwriting Is Unable to Provide Assistance With:

- Supplies
- Direct-to-consumer (DTC) life and health policies
- Medicare supplement, dental, annuities
- Any type of group policy
- Quotes, premiums, illustrations
- Licensing, except to advise anti-money laundering (AML) status
- Compensation questions, Agent of Record changes
- Extensive product knowledge
- Website assistance
- Changes to who a policy output is being sent to



Contact Information

Monday-Friday, 7:30 a.m. to 5 p.m. CST

Advisors Direct Dial Phone Number: 1-800-715-4376

Brokers Direct Dial Phone Number: 1-800-775-7896

Express Underwriting Email:
ExpressRiskAssessment@mutualofomaha.com

Fully Underwritten Email:
FullyUWGeneralqq@mutualofomaha.com



Senior Health Solutions Underwriting Support

Senior Health Solutions Underwriting is responsible for reviewing and processing new business applications for Medicare Supplement (Med Supp) and individual dental policies, catering to individual customers who are either sold by advisors, brokers or directly to consumers. This role involves conducting health interviews through both inbound and outbound phone calls, processing voice amendments and requesting the necessary information to facilitate underwriting decisions. Additionally, the team includes status line representatives who address inquiries related to application status.



Assistance Senior Health Solutions Underwriting Can Provide:

- Health interviews
- Voice amendments to Med Supp applications where applicable
- Status requests on pending new business applications
- Prequalification questions from advisors and producers
 - Post issue requests within 30 days of policy issue (i.e., plan type change, redate, addition of household discount rider)



Senior Health Solutions Underwriting Is Unable to Provide Assistance With:

- Any requests related to other insurance products that are not Med Supp or individual dental (we do not service other health and life products or Medicare Advantage)
- Website assistance: troubleshooting e-App entry, voice signature, Sales Professional Access (SPA)
- Reinstatements
- Supplies
- Changes to enforce Med supp or individual dental policies over 30 days from the date of issue
- Extensive product knowledge
- Requests for status on a state appointment addition
- Requests for plan rates
- Compensation questions, Agent of Record changes
- Policy benefit questions
- Claims questions



Contact Information

Monday-Friday, 8 a.m. to 4:30 p.m. CST

Main Phone Number: 1-800-995-9324
(option 1 for status, option 6 for underwriting)

Fax Number: 402-997-1920
(requirements for pending applications with a policy number)

Senior Health Solutions Underwriting Email:
msuw@mutualofomaha.com

Mutual Of Omaha Technical Support

If you have a computer software, hardware, email account access, e-Application, website or login question contact Technical Support. Assistance is provided to advisors, brokers and division office employees.



Hardware and Software Requirements

- Operating Systems: Windows 10, MacOS Sierra (10.12)
- RAM: 8 GB
- Internet service provider of your choice
- Current version of the internet browser of your choice (Chrome, Firefox, Edge, Safari)
- Internet connection speed 10mbps download (basic usage) but 20mbps is required for best results and use of all tools/apps (video/voice calls/screen sharing)
- How to check Internet connection speed:
Go to www.fast.com and the speed test will automatically begin
- Appropriate safeguards such as personal firewall, updated anti-virus software, anti-spyware and encryption software

Please Note: New hardware and software are developed and released at a rapid rate, and upgrades to existing software occurs frequently.

It is difficult to try and keep pace with the specific versions and releases from all the multiple vendors. We recommend that you keep current with the hardware and software you use so that you are up to date with security patches and new features offered by the vendors.

If you are not already setup to receive automatic updates from them, please view their websites for how you may be able to do this.



Assistance Technical Support Can Provide:

- Sales Professional Access (SPA) technical issues and registration
- Okta registration
- Winflex Web technical issues
- Division office printer setup and technical issues



Technical Support Is Unable to Provide Assistance With:

- Completing paper or electronic applications
- Policy specific questions
- Product questions
- Compensation specific questions
- Application status
- Winflex Web how to's
- General SPA navigation questions
- Requests for plan rates
- Compensation questions, Agent of Record changes
- Policy benefit questions



Contact Information

Monday-Friday, 7 a.m. to 5:30 p.m. CST

Phone Numbers for Advisors and Brokers:

1-800-228-7669

1-800-847-9785

Email: producertechsupport@mutualofomaha.com

Compensation Call Center



Assistance the Compensation Call Center Can Provide:

Broker Queue to include direct-to-consumer (DTC) (External 3rd Party): Broker Compensation

- Commission rates, schedules, amounts paid on policies and inquiries on commission statement data
- Contest/incentive inquiries and reporting
- Bonus payment inquiries
- NAIC state compensation rules
- Million Dollar Round Table (MDRT)

Agency Queue: Agency Compensation

- Commission rates, schedules, amounts paid on policies, agent pay statement inquiries
- MOIS, MOMCO and manager compensation
- Bonus payment inquiries
- Contest/incentive inquiries and reporting

Debt Inquiry Queue: Brokerage Debt Recovery

- Debt inquiries, applying payments and statement review

Debt Payment's Interactive Voice Response (IVR): Debt PinPad

- Producers can make payments towards their debt balance



Contact Information

Monday-Friday, 8 a.m. to 4:30 p.m. CST

Email: broker.compensation@mutualofomaha.com

Other Compensation Phone Numbers:

ADP Deferred Compensation: 866-266-4881

Assured Life Association: 877-466-8353

Columbian Financial Group/Columbian Mutual Life: 866-814-4313

Federal Life: 800-338-4218

Gerber Life Insurance Company: 877-466-8353

GPM Life/GPM Health & Life: 866-387-4401

Woodmen Comp 800-998-4606



The Compensation Call Center Is Unable to Provide Assistance With:

Producer Management

- Licensing, appointments, contracts
- Inquiries/Updating producer bank and demographic information
- Irrevocable assignment of commission forms (email: DMPContracting@mutualofomaha.com)

Underwriting

- Pending policy questions
- Receiving post issue requirements
- Initial premium questions for life policies

Policyowner Services

- Statuses on policies or any other policy inquiry
- Premiums (including drafts or re-drafts) after initial premium
- Initial premium questions for Health policies
- Producer of Record changes (agency/brokerage distribution)
- Life policies (email: MyCustomerService@mutualofomaha.com)
- Health/LTC (email: Health.Operations.Producer.Change@mutualofomaha.com)

Sales Support Units

- Quotes and illustrations
- Product related questions
- Bonus/incentive qualifications

Technical Support

- Website assistance

Policyowner Services: Life, Health and Annuity Operations

The Policyowner Services Life, Health and Annuity Operations Team offers direct support to policyholders, advisors and brokers requiring assistance with individual policies. The department provides ongoing support for producer-sold policies from the time of issuance until the insured's passing, as well as for direct market-sold policies from the submission of the application until the insured's passing.



Assistance Policyowner Services Can Provide:

Life Policies

- Changes of ownership and collateral assignments
- Beneficiary requests
- Agent of Record changes
- New business cancels, policy terminations, surrenders
- Billing information for policy premiums
- Updating policyholder personal information
- Duplicate life insurance policy requests
- Policy loan and partial withdrawal requests
- Customer access registration and troubleshooting
- Other related items for an issued/active policy

Health Policies

- Duplicate policy requests
- Duplicate ID card requests
- Producer of Record changes
- Termination requests
- Premium and billing related requests, premium rate inquiries
- Process premium payment
- Update billing frequency or mode
- Update bank information
- Reinstatements
- Inquiries from providers
- Demographic changes (address/email/phone)
- Medicare Supplement claims inquiries from customers and providers
- Customer access registration and troubleshooting
- Other related items for an inforce policy, other than processing claims

Annuity Policies

- Changes of ownership and collateral assignments
- Surrenders, loans and withdrawals
- Policy premium related items
- Billing changes
- Billing inquiry
- Update banking information
- Stop automatic billing
- Updating customer's contact information
- Policy specific information
- Maturity options for annuities and life insurance policies
- Duplicate annuity policy requests
- Structured settlements filed before the year 2000
- Set up and servicing of individual and group hold on deposits for minor beneficiaries
- Life insurance value calculations
- Annuities with long-term care riders
- Tax documents such as 1099R and 5498's
- Other related items for an issued/active policy

Policyowner Services continued on next page.

Policyowner Services: Life, Health and Annuity Operations Continued



Policyowner Services Is Unable to Provide Assistance With:

Underwriting

- Pending individual applications (status) on producer sold policies
- Initial premiums, brokerage and agency sold
- Mode changes (re-issues) within the first year of the policy, brokerage and agency sold

Sales Support Units

- Supplies
- Quotes, premiums, illustrations on inactive policies
- Extensive product knowledge

Health Policies

- Long-term care, Medicare Supplement, dental, annuities

Workplace Solutions

- Any type of group policy

Contracts and Appointments

- Licensing producers or status of producers (contract or appointment)

Comp-Agent Broker Commissions

- Compensation questions

Producer Tech Support

- Website assistance



Contact Information

Monday-Thursday, 7 a.m. to 5:30 p.m. CST

Friday, 7 a.m. to 5 p.m. CST

Email: MyCustomerService@mutualofomaha.com

Annuity Phone Number: 800-646-7592

Life and Health Phone Number: 800-775-6000

Claims: Supplemental Health (Cancer, Hospital and Critical Illness)

The Individual Cancer Hospital Claims team pays out claims for covered services that have already been rendered.



Assistance Supplemental Health Claims Can Provide:

- General claims processes
- Filing or following up on a claim for an individual cancer policy
- Filing or following up on a claim for an individual hospital policy
- Filing or following up on a claim for an individual acquisition, specialty Major Medical or Critical Illness policy
- Policy benefits inquiries
- Handling of estate claims



Supplemental Health Claims Is Unable to Provide Assistance With:

- Provide policy specific information to third party representatives without authorization from the insured
- Handle, adjust or advise premium payments
- Handle any billing questions or changes
- Adjust benefits on a policy
- Increase value of policy by adding coverage
- New business or questions on pending applications
- Handle ownership changes
- Handle terminations or cancellations
- Advise or handle underwriting decisions
- Add or remove dependents



Contact Information

Monday-Thursday, 7 a.m. to 5:30 p.m. CST
Friday, 7 a.m. to 5 p.m. CST

Phone Number: 800-755-1000

Email: medsupclaimsreview@mutualofomaha.com

Claims: Individual Life and Annuity

The Individual Life Claims team assists with verifying, processing and paying out benefits to beneficiaries after the insured person's death. They act as the gatekeeper for benefits, ensuring that legitimate claims are paid out promptly and accurately, while also protecting the insurer from fraudulent or ineligible claims.

The Individual Annuity Claims team handles changes to an annuity or structured settlement that occur when an owner or annuitant passes away, including the payment of benefits. This includes ensuring eligible payment or policy continuation options are presented and proper tax reporting is done at the time of payment.



Assistance Individual Life and Annuity Claims Can Provide:

- Receive and initialize claims
- Provide necessary forms to beneficiaries
- Collect and review documentation
- Provide policy verification and ensure policy is in force
- Conduct a more thorough investigation during the contestability period if needed
- Review for potential fraud detection
- Determine payout and settlement to beneficiaries
- Act as primary point of contact for beneficiaries throughout the claims process
- File a waiver of premium due to unemployment
- Answer questions regarding 1099s and other tax questions



Contact Information

Monday-Thursday, 7 a.m. to 5:30 p.m. CST

Friday, 7 a.m. to 5 p.m. CST

Individual Life Claims:

Phone Number: 888-493-6902

Email: ifslifeclaims@mutualofomaha.com

Annuity Claims:

Phone Number: 800-646-7592

Email: annuityclaims@mutualofomaha.com



Agent of Record Changes

Products:

Health Products

- Medicare Supplement, senior dental, long-term care (LTC), disability, accidental death
- Email: Health.Operations.Producer.Change@mutualofomaha.com

Life Policies

- Email: Life.service@mutualofomaha.com

Group Insurance

- Workplace Solutions CS
- Phone Number: 1-800-369-3809

Service 33

- LTC policies, Health Income Solution policies
- illumifin Phone Number: 952-833-5410

Agent of Record Changes That Go to Service (Life or Health Depending on Product):

- Add servicing individual producer policies for book of business transfers
- Add individual servicing producer to individual policies
 - Can't add a company — must be an individual
 - Can't remove, can only add or replace
- Full individual producer change (servicing and commissions) for individual policies
 - Two-step process: commission has to be done by dmpcontracting@mutualofomaha.com and then part two is done by life or health depending on product
- Review status of Producer Of Record change/book of business transfer
- Producer needs to have producer number and policy information available/ready to process change

Contact DMPContracting@mutualofomaha.com With Policy Number List for These Events:

- Agent death
- Corporate mergers
- Agent assign commissions to other entity

Agent of Record Changes Continued

When to Contact Contract and Appointments Producer Management:

- Updating producer information (address, phone, name) — self service also available in Sales Professional Access (SPA)
- Stopping policy correspondence going to producers
- Advising producers how to get contracted/licensed/training

Additional Information Before You Transfer:

- Change Hierarchy/Upline/BOB Code for either producers or policies (policies will always have same hierarchy for life of policy)
 - Not possible if this stays the same for the life of the policy
- Give access to policies on SPA if Producer of Record change didn't grant it
 - Policy information does not move from one agent SPA portal to the new Agent of Record's SPA portal — this is not an option
- Assign new producer without policyowner naming/identifying new producer
 - Not possible — we must always must have the policyowner's consent due to privacy and confidentiality.



Why Mutual of Omaha

Over 50 years of Mutual of Omaha's Wild Kingdom taught us that the animal kingdom and the human kingdom have something in common ... an instinct to protect what matters most. Through insurance and financial products, we help people protect their lives, protect their families, protect their kingdoms.

mutualofomaha.com



Directory for Royal Neighbors of America

Listed below you will find all the contact information needed when doing business with Royal Neighbors.

Main number and address:

Royal Neighbors of America
Rock Island Office
230 16th Street
Rock Island IL 61201
1-800-627-4762

Advertisement Approval:

1-800-770-4561 x 8286. To help expedite approval, please refer to [agent advertising guidelines](#).

Commissions:

1-800-770-4561 Option 2
Commission statements can be viewed online on the agent website.

Contracting:

1-800-770-4561 Option 3
Our Licensing & Contracting department provides copies of renewed licenses, address/phone number updates and direct deposit change requests. We can also be reached via fax or email using the information below:

Agent contract email: agentcontract@royalneighbors.org

Agent contract fax: 877-445-7579

Sales Support /Supplies:

1-800-770-4561 Option 5

Fraternal Department:

For Membership questions, information on starting a new chapter system or benefit inquiries contact our Fraternal Department at 1-800-627-4762.

New Business Status Life and Annuity:

You may check the status of pending business online under the Reports tab. For application status questions or to provide outstanding information on a case, email our New Business department at uw@royalneighbors.org or contact us by phone at 1-866-733-9758 (Agents), then Option 1: Pending Applications or Certificate Changes, Option 1 (Pending Life Applications) or Option 2 (Pending Annuity Applications).

New Business Submit Application:

Life and Annuity applications should be faxed to: 1-866-787-1450

Point-of-Sale Underwriting:

For Simplified Issue and Graded Death Benefit Whole Life only. After pre-qualifying your client, call (866) 281-9228 during MRS business hours for a telephone interview.

Report a Death Claim:

Death claims can be reported by calling 1-800-627-4762. They can also be reported online on our public website using the [death report form](#).

Sales Support Department:

Monday- Friday: (800)770-4561, Option 1, Option 5

Email: SalesSupport@RoyalNeighbors.Org

Online: agent.royalneighbors.org

Supplies:

Supplies may be ordered quickly and easily online under the Forms and Supplies tab. You will also have the ability to track your order, download PDF's and view prior orders placed. If this method of supply ordering is unavailable to you, orders may be emailed or faxed to the locations below:

Supplies email: shipping@royalneighbors.org

Supplies fax: 1-866-837-5835

Website Support:

1-800-770-4561 Option 5 or agentsupport@royalneighbors.org

SBLI USA - Agent Support Contact Sheet

Agent Center Hotline: 1-877-SBLI-USA (1-877-725-4872) / 1-866-380-6413

Agent Support Email: annuityagentcare@prosperitylife.com

Agent support page: sbliusa.com/AgentCenter/contactUs.do

Customer support page: sbli.com/support/contact-us

CONTACT SHEET

INDEPENDENT AGENCIES

For Agent Use Only. Not for Use With the Public.

261362IAR3



TRANSAMERICA®



INTRO, TIPS, & TRICKS

Working with multiple carriers and managing all your contacts can get complicated.

That's why we've prepared an easy-to-navigate contact sheet for our valued agents and firms. All of your common contacts are now within arm's reach to help you sell, place, and manage business.

QUICK START GUIDE

We process business on a first-in, first-out basis. This means we always work business in the order it's received. Should a mistake be identified, internal Transamerica support is able to request expedited processing to address the issue.

The standard processing time for email requests is 24–48 hours. Specific processing for various departments is detailed in this packet to provide a realistic timeframe. Escalations should be directed to your internal contact if these timeframes have not been met, however, you should first check the portal as the most up-to-date information on specific cases will always be posted there.

When reaching out to our teams, please first use the regular processing email box for the team you need to contact. If you don't get resolution from that email, then use the escalation email box (if applicable). If not, please reach out to your internal contact to escalate on your behalf.

Please do not use or share individual contact email addresses (Account Managers or Sales Partners being the exceptions). Since these individuals work primarily in their department's email box, they may not always check their personal inboxes regularly. This can cause further delays when you're trying to get help.

For escalations, please send the full email chain to your Transamerica partner so they can review what has been done, to determine the next best steps to resolve the issue the most efficient way.

The most efficient way to resolve issues is to keep one line of communication. Emailing several contacts about the same issue (without others knowing) can cause unnecessary delays. If another contact is brought in, please copy (CC:) previous individuals or teams.

Our contacts are here to help in any way they can, but we're all human. Should one of our processors ever provide incorrect information, they will be coached to ensure that information is not shared again. Keep in mind, Transamerica will not always be able to honor answers given in error.

MASTER LIFE CONTACTS

WEB PORTALS		
agentnetinfo.com		
secure.transamerica.com		
IMPORTANT PHONE NUMBERS		
Toll-Free Number to Call	877-234-4848	
Underwriting & New Business Questions - Life, Final Expense	Option #1	
Commissions	Option #2	
Contract & Licensing	Option #3	
Policyholder Customer Service/Claims	Option #4	
Sales Desk/Product Support	866-545-9058	
iGO e-App support prior to case submission	866-303-7833	
Sales Office Technical Support (SOTS)	866-303-7833	
Technical Support at iPipeline®	800-641-6557	
AUTHORIZED PARAMED COMPANIES		
APPS-Portamedic	800-727-2101	appslive.com
Insurance Medical Services, Inc.	877-808-5533	imsparamed.com
Exam One Inc.	800-768-2056	examone.com
ExamOne Superior Solutions	800-898-3926	smminsurace.com
Client Lab Results	https://transamerica.accessmyhealth.com/	
IMPORTANT FAX NUMBERS		
New Business/Reissues	866-297-3607	
Conversions/Rewrites - Life Only	800-238-4302	
In Force Customer Service	866-622-5051	
Contract & Licensing	888-837-2820	
DIVISION PHONE NUMBERS		
Annuities (General Customer Service)	800-797-2643	
Mutual Funds	888-233-4339	
Employee Benefits	866-411-4159	
Retirement	800-211-8491	
MAILING ADDRESS		
Billing, Mail Premium, & Overnight Requirements	6400 C Street SW Cedar Rapids, IA 52499	

MASTER LIFE CONTACTS CONTINUED

IMPORTANT EMAIL ADDRESSES	
Life Sales Desk	lifesales@transamerica.com
iGO e-App® Tech Support (Prior to app submission to Trans)	igosupport@ipipeline.com
New Business – Term, IUL	life.marketsnewbusiness@transamerica.com
New Business – Final Expense & <i>Transamerica Lifetime®</i>	finalexpensenewbus@transamerica.com
Attachments Only – In Force for 8-digit policy numbers starting with 0, 4, and 9; 9-digit policies starting with 6600. *Body of email will NOT be read-include policy number in subject line.	interimcsforward@transamerica.com
Attachments Only – In Force for 9-digit policy numbers starting with 011, 012, 013, 014, 015, 016, 8, LFC, FEX, etc. *Body of email will NOT be read - include policy number in subject line.	afpcrcustomerservice@aegonusa.com
New Business – Escalations Emails received prior to 3 p.m. CST will get same day response.	TANBEscalations@transamerica.com
International Underwriting Quick Quotes	international@transamerica.com
Contract & Licensing - Life	tlp-crcontractadmin@transamerica.com
Commissions	commissions@transamerica.com
In Force Customer Service Inquiries	tii.customerservice@transamerica.com
In Force Customer Service Inquiries for Policies Starting with "60"–"65"	Life.CustomerService@transamerica.com
In Force Policy Change Inquiries and Reissues for Life Insurance Policies	tii.customerservice@transamerica.com
Duplicate policies and complex post-issue corrections, research, and inquiries	afpcrtranscomcorr@transamerica.com
Conversions to IUL & Internal Replacements - For initial questions about eligibility or to run illustrations please contact the Sales Desk	Eligibility: tii.customerservice@transamerica.com Processing: conversionsandinternals@transamerica.com
Conversions to Whole Life & Internal Replacements - For initial questions about eligibility or to run illustrations please contact the Sales Desk	Eligibility: tii.customerservice@transamerica.com Processing: conversionsandinternals@transamerica.com
Claims	bkgclaimsstatus@transamerica.com
Claims for Policies Starting with "60"–"65"	lifeproclaims@transamerica.com
Customer Service – Policy loan, surrender, withdrawal, free look, and 1035 exchanges	afpcrtranspoloansurr@transamerica.com
Agent Portal Technical Support and Sales Office Technical Support (SOTS)	Salesoffice-support@transamerica.com
iPipeline Technical Support (iGO)	igosupport@ipipeline.com
Underwriting Support - Used for APS fee approval, requesting copies of labs and exams, getting information to an UW working a case	professionalrelations@transamerica.com

WHO TO CALL, SLAs

DEPARTMENT/REASON TO CONTACT		SLA TIME
<p>Premium</p> <ul style="list-style-type: none"> • Premium Collections (In Force Policies) • Billing/Billing Issues • Timing of Premium Payments for Conversions • Applying Money to Premiums • Group Payroll • Salary Deduction • Waiver of Premium 	<ul style="list-style-type: none"> • CSFL Individual Billing Queues Billing & SSBO • Speedpay • Overdrafts • TEFRA/TAMRA • Banking & Credit Card Updates • Shortages & Grace Period • Returns - Checks, PAC, Credit Card • Payments - Lockbox, Checks, Wires 	<p>24-hour (automated response) 3 business days ETA for critical requests Same day for VUL policies 5 business days ETA for standard work</p>
In Force Policy Illustrations		<p>5 days for general inquiries 2 days for escalations@ipeline.com</p>
<p>Commissions</p> <ul style="list-style-type: none"> • General Questions, Billing, Billing Issues • Change of Servicing Agent • Off Cycle • Commission Requests • Statements • History • Chargeback Rules • Advances 		<p>5 business days for general inquiries 2 business days for escalations</p>
<p>Sales Desk</p> <ul style="list-style-type: none"> • Conversions • Illustrations • Quotes • Product • Questions • Riders and Benefits • Questions 		<p>24-48 hours for response time. Please request specific processing SLA time from your contact.</p>

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT	SLA TIME
<p>Contracting & Licensing</p> <ul style="list-style-type: none"> Contract Paperwork Termination Status Contract Status Contract Paperwork Transfer Book of Business Lack of Production Agent Holds View Information GA Mass Transfer From One IMO to Another 	<p>Appt requests: 2-3 business days Contact info update: 5-6 business days Direct deposit update: 5-6 business days General inquiries: 5-6 business days Termination requests: 30-31 business days Agent change on in force policy: 2-3 business days</p>
<p>Contact Center</p> <ul style="list-style-type: none"> Non-Escalation Issues Banking Information In Force Questions General Maintenance Beneficiary Questions Premium Collections - In Force Policies All Billing and Premium Collections Billing Issues Timing of Premium Payments for Conversions Applying Money to Premiums Conversion Questions 	<p>Policy changes/updates, illustration, NTO requests, ownership changes, POA/guardianships, reinstatement (no UW), reissue (no UW), release of assignment, rewrite (no UW), surrender, third-party authorization, withdrawals: 3-5 business days; 1035 exchanges, correspondence/histories: 5-7 business days Duplicate policies, general research: 5-10 business days Premium research: 7-10 business days Custom illustrations: 10-15 business days Policy change, reinstatement, reissue, rewrite (all with UW): 30-60 business days</p>
<p>Traditional New Business</p> <ul style="list-style-type: none"> Policy Questions Application Requirements Policy Errors Reissue Requests General Underwriting Questions Status of Submitted Work 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>
<p>SOTS</p> <ul style="list-style-type: none"> Set Up GA/Producers GA Access General GA Tech Support Manages Global Address Book User Requests/TransAct Logins Main Account Creation 	<p>Emails: 24-48 hours Phone calls: Same day for response</p>

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT	SLA TIME
<p>LifePro</p> <ul style="list-style-type: none"> • Illustration Issues • Life Pro Conversions • Owner and Beneficiary Changes • Custom Illustrations 	<p>Surrender requests, cancels, not takers, complaints, conversions, loans, withdrawals, NFO, tax requests: 10-15 business days</p> <p>Reinstatement requests, reissues, rewrites, complex research, complex correspondence, any work requiring UW, 1035 exchanges: 15-30 business days</p> <p>Billing/PAC changes, approved rush requests: 3-5 business days</p> <p>Beneficiary and ownership changes, loan histories, premium histories, duplicate policies, ownership changes, beneficiary changes, name change, SSN updates, deceased ownership change, collateral assignment, release of assignment, POA/guardianship, third-party authorization, stop pays, bank statement review, address changes, entity and trust updates: 7-10 business days</p> <p>Illustration requests: 20-30 business days</p>
<p>Underwriting</p> <ul style="list-style-type: none"> • Reason for Decline • Consider Better Offer • Foreign Nationals (email inbox) 	<p>2 days for everything - initial reviews and WIP (mail) items</p>
<p>Corrective Processing</p> <ul style="list-style-type: none"> • In Force Policy Changes and Reissues for Life Policies 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>
<p>Policy Reinstatements</p>	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>
<p>Complex Corrections</p> <ul style="list-style-type: none"> • Duplicate Policies • Post-Issue Research and Inquiries 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT		SLA TIME
<p>Policy Loan and Surrender</p> <ul style="list-style-type: none"> Loans Tax Consequences/1099 Tax Statements Withdrawals/Partial Surrenders Dividends Cancellations/Not Takens/Freelooks VUL Disbursements Surrenders Cost Basis & Form 712 External 1035s 	<ul style="list-style-type: none"> Stop Pays Overloans Maturities Restore General Inquiries Unclaimed Property One-Year Term Insurance Life Admin. Disbursements Dormants Medicare Supplement Disbursements External 1035s 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>
<p>Beneficiary Title</p> <ul style="list-style-type: none"> SSN and Name Changes Deceased Owners Beneficiary Changes POA/Trusts/Entities Owner & Payor Changes Legal Miscellaneous 	<ul style="list-style-type: none"> Assignments and Releases Third-Party Authorizations Bankruptcy Special Authorizations Address Changes Corporate Resolutions 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>

Trinity Life Insurance Company - Contact Sheet

Office: 918-249-2438

Toll free: 866-211-0811

Address: 7633 East 63rd Pl. Suite 230, Tulsa, OK 74133

Hours: Mon-Fri 9:00am-5:00pm

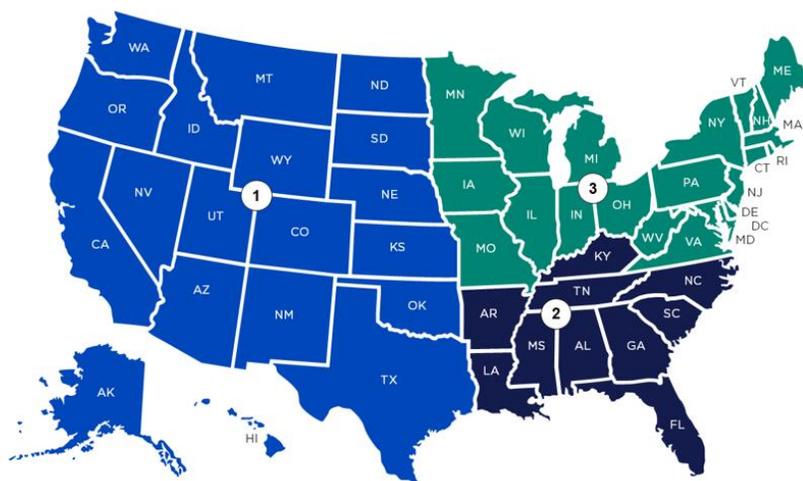
Agent Portal: trinity.ihlic.com

Contact page: trinitylifeinsurance.com/contact



Life sales support contacts

At Nationwide®, we're dedicated to helping you get the answers you need so you can spend more time growing your business.



Need help? Financial professionals can contact our sales team at **1-800-321-6064**.

LIFE SALES SUPPORT BY REGION

1. West: AK, AZ, CA, CO, HI, ID, KS, MT, ND, NE, NM, NV, OK, OR, SD, TX, UT, WA, WY			
Nate Hatem	Regional Wholesaler	n.hatem@nationwide.com	614-371-8610
David Goluboff	CareMatters Wholesaler	golubd1@nationwide.com	310-625-9297
Cas Barnes	CareMatters Regional Internal Consultant	barnc2@nationwide.com	614-435-3010
2. Southeast: AL, AR, FL, GA, KY, LA, MS, NC, SC, TN			
David Lane	Regional Wholesaler	laned17@nationwide.com	614-425-8445
Jack Brewer	CareMatters Wholesaler	brewea4@nationwide.com	614-370-1106
Cas Barnes	CareMatters Regional Internal Consultant	barnc2@nationwide.com	614-435-3010
3. Northeast: CT, DE, IA, IL, IN, MA, MD, ME, MI, MN, MO, NH, NJ, NY, OH, PA, RI, VA, VT, WI, WV and Washington, D.C.			
Rodney Cyrus	Regional Wholesaler	cyrusc1@nationwide.com	614-270-7843
Jack Brewer	CareMatters Wholesaler	brewea4@nationwide.com	614-370-1106
Cas Barnes	CareMatters Regional Internal Consultant	barnc2@nationwide.com	614-435-3010

FOR INVESTMENT PROFESSIONAL USE — NOT FOR DISTRIBUTION TO THE PUBLIC

Nationwide Investment Services Corporation, member FINRA, Columbus, Ohio.

Nationwide, the Nationwide N and Eagle and CareMatters are service marks of Nationwide Mutual Insurance Company. © 2024 Nationwide

LAM-5098AO.10 (10/24)

Contact Us

Mailing Address

Regular Mail:

P.O. Box 7192
Indianapolis, IN 46207-7192

Overnight:

225 S. East St.
Indianapolis, IN 46202

Telephone & Fax Numbers

Business Hours:

Monday - Friday; 8:00 am - 6:30 pm, Eastern.

Toll Free Number:**Indianapolis Area:****New Business Fax Number:****Inforce Policy Service Fax Number:****Claims Fax Number:****Underwriting Fax Number:****Marketing Fax Number:**

800-428-3001
Clients: Option 1
Agents: Option 2

317-692-7979

317-692-7711

317-692-8402

317-692-8418

317-692-7636

317-692-7215

New Business

Submission, Issue, and Pending Cases:**New Business:****New Business Email:**

800-428-3001, Option 1

UHL.NewBusiness@unitedhomelife.com

Life Operations

Surrenders, Loans, Owner/Beneficiary Changes:**Policy Service:****Policy Service Email:**

800-428-3001, Option 2

UHL.PolicyService@unitedhomelife.com

Claims

**Health, Disability, and Death Claims:
Claims:**

Claims Email:

800-428-3001, Option 7

Barb.Crase@unitedhomelife.com

Underwriting

Underwriting Helpline:

Email:

800-428-3001, Option 4

UHLUnderwriters@unitedhomelife.com

Marketing

Website Assistance, Supplies, and Product Information:

Marketing Email:

Agent Services Email:

Licensing and Contracting:

Commissions and Debit Balance Information:

800-428-3001, Option 6

UHL.Marketing@unitedhomelife.com

UHL.Contracting@unitedhomelife.com

800-428-3001, Option 5

800-428-3001, Option 3