New Business Transmittal Form

☐ Life Brokerage ☐ Partners Group

Complete this SECTION for Agent's FIRST PIECE OF BUSINESS Only

Agent Name: ____________________ Date L&C Paperwork submitted to Home Office: ____________

Agent Code Number: ____________________

If Code Number not yet assigned, Agent's SSN or TIN: ____________________

Policy Number ____________________ Applicant Name ____________________ DOB ____________

Agency Number ____________________ Agency Name ____________________

Agent/Service Number ____________________ Agent Name ____________________

☐ New Application

☐ Underwriting Requirements

☐ Delivery Requirements

☐ Reissue (Indicate instructions below)

☐ Other ____________________

☐ Informal/Trial App (Quote - Authorization required w/personal information)

☐ Previous Informal/Trial/Quick Quote Number ____________________

CONTACT INFORMATION FOR CASE FOLLOW UP

Name: ____________________

Phone: ____________________ ext: ____________

Fax: ____________________

E-mail: ____________________

SPECIAL INSTRUCTIONS

☐ This is a Companion Case ☐ Issue w/Companion Policy # ____________

☐ More than one application on same applicant ____________________

☐ 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

ePOLICY DELIVERY INSTRUCTIONS (Availability varies by product and distribution channel)

☐ **ePolicy Delivery (Deliver this policy electronically to the policy owner email address on the application)**
*policy owner email address must be provided on application.

OTHER INFORMATION

APS: ____________ ☐ Agent Ordered ☐ Carrier Ordered ☐ Dr. Name: ____________

APS: ____________ ☐ Agent Ordered ☐ Carrier Ordered ☐ Dr. Name: ____________

Inspection Report: ☐ Agent Ordered ☐ Carrier Ordered

OTHER SPECIAL INSTRUCTIONS

Remember: https://www.corebridgefinancial.com/connext is your source for policy and form information.

By providing complete and accurate information, processing time can be expedited.