

OBTAINING SIGNATURES DURING THE COVID CRISIS

Continue Your Business



Mutual Trust's **Remote Signature Process** can help you obtain all the signatures needed for the application process without face-to-face meetings. Simply upload the application to Mutual Trust and we'll use DocuSign® software to route the forms for signatures—no more aligning calendars to schedule appointments. Signers can conveniently access the documents via their email. The easy steps for this process are outlined below.

1. Complete the Application—Access the Mutual Trust life insurance application package from our Agent Website. The forms can be completed and saved on-line. Be sure to fill all forms completely, including the city and state where the client will be signing them.

TIP: DOUBLE-CHECK ALL EMAIL ADDRESSES FOR ACCURACY.

Please note: Email addresses and cell phone numbers are required for everyone who needs to sign these documents—including you (the agent), all proposed insureds, owners, payors, legal guardians of minor insureds, grantors and irrevocable beneficiaries, as applicable.

2. Upload forms for the Remote Signature Process*—Go to the *Remote Signature* section of the Agent Website and click on the "Submit Applications for Remote Signatures" button. Then follow instructions to upload the forms.

TIP: THE REMOTE SIGNATURE SECTION CAN BE ACCESSED FROM THE BOOK OF BUSINESS PAGE OR THE QUICK LINKS.

3. Sign the forms—An email from *NewBusiness@mutualtrust.com* will be sent to all required signers, including you.

TIP: CALL THE OTHER SIGNERS TO ENCOURAGE THEIR TIMELY RESPONSE.

Signers will need to enter the last six (6) digits of their Social Security Number (SSN) for identity verification. If SSN verification is not possible, signers will be sent an access code via text or email.

TIP: CREATE AN ACCOUNT WITH DOCUSIGN TO AVOID REPEATING THIS PROCESS.

* Any additional information or documents related to the application should not be sent through this portal. Use the *Message and Document Upload Center* instead. Provide a policy number, if available, and the name of the proposed insured.

4. Check Application Status—Once all signatures have been obtained, you and Mutual Trust will receive a signed copy of the application package. You will be able to access pending status on the Agent Website a few days after all signatures have been received.

5. Policy Delivery—Signatures needed on application amendments will automatically be obtained using the Remote Signature Process (provided this same process was used to obtain the initial signatures). The policy package will then be sent to the agent for delivery to the client.

Agents may continue to submit business as they always have. Mutual Trust's Remote Signature Process provides you with another option for processing applications with us.

For more information, contact Sales Development at 800-323-7320, ext. 5140, or SalesDevelopment@mutualtrust.com.



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