

Remote Arrangement New Business Process

Your health and the health of the families you serve is of paramount importance to us. So that you may continue to provide uninterrupted service to your customers while observing guidelines for social distancing and limited personal contact, we encourage you to use the following **temporary** new business procedures during the COVID-19 pandemic to complete preneed funeral arrangements.

APPOINTMENTS

You may conduct appointments on the **phone** or via **video conferencing** platforms such as Skype, Facetime, Google Meet, etc.

UNDERWRITING

You may still offer full death benefit coverage, provided that you ask the proposed insured **all health questions**. Per our underwriting guidelines, to qualify for full coverage, a customer must answer all health questions "No." Please note that the 2-year contestability period still applies.

APPLICANT SIGNATURES

Signatures may be obtained in the following ways:

- **Printed and Scanned** – Customer prints, signs and then scans completed application to counselor through email.
- **Electronically** – Customer signs the Electronic Document Disclosure and Consent Form (A9568-03) and completed application using approved electronic signature method (DocuSign, Acrobat Reader, etc.) and returns via email.
- **By Mail** – Customer signs and returns completed application through US Postal Service.

SUBMISSION TO GLOBAL ATLANTIC

We will accept completed applications by Sharefile, fax and mail. Please note, Sharefile submission is preferred, as faxed and mailed contracts currently require additional processing time.

REQUIRED FORMS

The following forms must be completed to conduct pre-arrangements with families remotely:

- **Electronic Document Disclosure and Consent Form** (for electronically signed contracts)
- **Goods & Services Page**
- **Funeral Planning Agreement**
- **Insurance Enrollment Application**
 - Please provide a photo of a personal check or voided check for APA
 - Cashier's checks and money orders cannot be accepted electronically
- **ID Verification Form** (if applicable)
- **Preneed New Business Options Form** (Section 1 completed on every application, sections 2 and 3 as needed)
- **State-Specific Forms as Required**

We're here to help.

If you have any questions, please contact your eSales Consultant at (866) 449-3722 or preneedsales.support@gafg.com.

For policy or other general questions, contact customer service at (800) 331-8853 or ask.us@gafg.com.

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