



Case Submission Checklist

For fast, efficient application processing



Use this checklist to ensure your application packet is in good order prior to submission.

Providing complete, accurate information with each application helps ensure the fastest route to underwriting review and approval.

Coversheet/New Business Transmittal

- Contact name/phone/e-mail provided
- Companion File(s) – noted
- Special issue or other instructions provided

Part A Application

- Ensure that all essential data fields and signatures are accounted for.
- See [Part A Checklist](#).

Application Part B and Paramed Exam

- Completed Paramed Exam and lab slip included with application when possible.
- See [Paramed Tips For a Faster Review](#)
- See [Preparing for Your Life Insurance Exam \(Client Guide\)](#)
- See [Submitting Other Companies' Exams](#)
- Application Part B signed and for the same state as the Application Part A.

Agent Report

- Signed and included.
- Correct Agent(s) and Agency codes provided

HIPAA Authorization

- Signed and included, using appropriate state-specific form.

Motor Vehicle Record Authorization (NH only)

- Signed and included; required for all New Hampshire cases.

Miscellaneous

- Illustration provided and matches application information
- State-applicable disclosure and supporting forms are for the same state as Part A Application
- See [Don't Let State Differences Slow Down Your Case](#)
- State-required HIV forms enclosed, same state as Part A Application

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