Intake Form For
SST

For agent use only.

Request for Life Insurance Interview

Name	First	MI	Last	❏ Male ❏ Female

Street

City		State	Zip

Social Security Number	Marital Status

Birthdate	What State was the insured born in?

Cell Phone
( )   ( )

Email:

Will the Applicant be the owner of this policy?   ❏ Yes   ❏ No

If not,

Name	First	MI	Last	❏ Male ❏ Female

Birthdate	SSN

Cell Phone	Email

Street

City		State	Zip

Relationship to Insured

Primary Beneficiary

Name	First	MI	Last	❏ Male ❏ Female

Birthdate	SSN

Cell Phone	Email:

Coverage Amount

Term Length (in Years)   ❏ 10   ❏ 15   ❏ 20   ❏ **30**

Payment Frequency: ❏ Annual   ❏ SA   ❏ Quarterly   ❏ Monthly

Do you current have life insurance or an annuity, NOT including insurance through an employer?   ❏ Yes   ❏ No

If yes, how much insurance do you currently have?

Will the coverage applied for replace or change any existing life insurance or annuity contract?

❏ Yes   ❏ No

What type of policy is it? Life or Annuity

Are you considering discontinuing making payments, surrendering, forfeiting, assigning to the insurer, or otherwise terminating your existing policy or contract?   ❏ Yes   ❏ No

Are you considering using funds from your existing policies or contracts to pay premiums due on the new policy or contract?   ❏ Yes   ❏ No

Why are you replacing your existing policy?

Existing Insurance Information:	Name of Insurer	Policy #	Name of Insured

Replaced or Financing

How long have you known the insured? And in what capacity?

What is the source of funds used to pay premiums on this policy? (income, savings, other)

Note: If there are additional polices, please attach a second page.

Permission to Obtain Additional Information for Carrier

❏ Yes   ❏ No

Agent Attestation

By clicking the I AGREE/SUBMIT button below, I state the following:

•   I am a duly licensed and appointed life insurance agent (with
AML training) in the state in which the application was solicited and the state in which the policy, if one is issued, will be delivered. if I am not currently appointed, I understand that I will need to be appointed by Symetra before the policy, if one is issued, can be delivered.

•   To I have verified whether the insured/Applicant has existing policies or contracts and whether a replacement is involved in this transaction. If replacement is involved, I have discussed the advantages and the disadvantages of the replacement with the Insured/Applicant and have determined that the transaction is appropriate.

•   That I have given the proposed Insured/Applicant only company approved sales materials

•   I authorize Symetra Life Insurance to obtain such administrative information as may be necessary to complete any life insurance application, replacement forms, or supplemental forms resulting from this Drop Ticket submission. I have explained to the insured/Applicant that no insurance has been bound based on the completion of the Drop Ticket.

•   I have reviewed and agree with customer electronic consent and disclosure agreement

•   I acknowledge that clicking the I AGREE/SUBMIT button below constitutes my signature on the form and has the same effect as if I personally signed the form and I authorize Symetra to affix my signature to the life insurance application and all other required forms, once the underwriting interview is completed and prior to delivery of the policy. I will immediatly notify the Company should this authorization or any prior signature authorization be terminated or revoked in any jurisdiction

Agent Signature: _____   ❏ **I AGREE**

SYMETRA®
RETIREMENT | BENEFITS | LIFE

Symetra *SwiftTerm's*
automated application process

A fast, easy way to purchase term life insurance.

Do you have young, healthy clients who want life insurance protection but are too busy for in-person meetings and medical tests? Symetra SwiftTerm's automated application process offers them a faster, easier buying experience and greater control over their time.

Our process is automated end-to-end: from application, to offer, payment and policy delivery. With three potential underwriting paths:

1 Instant approval

A client who qualifies for instant underwriting approval can start and finish their purchase for coverage completely online in as little as 25 minutes.

2 Accelerated underwriting

During electronic screening of a client's medical and lifestyle history, we may find that we need a little more information. Your client will receive an email letting them know and we'll keep the underwriting process moving!

Qualified applicants receive an email confirming approval of their application for coverage within 24-72 hours with instructions to complete the online onboarding process.

3 Full underwriting

Occasionally, we may find additional medical records or an exam is needed. Your client will be provided a link to schedule a medical exam and we will be in communication with both of you throughout the process. Qualified applicants receive an email confirming the approval of their application in about 30 days with instructions on how to pick up online where they left off.

Whatever the underwriting path, SwiftTerm℠ offers all applicants who qualify for coverage one convenient digital experience. And it all starts with you!

Let's review how the process works for a client with instant underwriting approval.

Digital Application

You start the application process, then your client gets a link to finish the rest!
No cumbersome paperwork or uncomfortable telemed interview, ever!

PRODUCER

You help your client determine the amount of SwiftTerm coverage they need. SwiftTerm is available to insured ages 20-60; policy sizes $100,000 to $2 million. Business owned coverage is not available.

- Your BGA adds Symetra SwiftTerm to their list of available iGO® products.
- You must be licensed and appointed with Symetra to drop a ticket for SwiftTerm through your partner's iGO® dashboard.[1]

Drops the ticket

The data you submit passes straight-through to Symetra's real-time intelligent application and underwriting process and sends a secure link to your client to pick up the application where you left off!

Stay informed: Stay on top of a client's progress via the usual pending case status tools on Symetra.com and iGO.

With instant approval, your client is immediately emailed a secure link to SwiftTerm's onboarding platform to complete their purchase.

Client is emailed a secure link to the electronic application process.

Reminders:
You and your client will be sent periodic reminders until the application is completed or the offer expires.

Tip:
If necessary, you can resend the link to your client or correct their email address in iGO.

CLIENT

Authenticates and completes application

Client authenticates and begins completing SwiftTerm's online, mobile-friendly application process.

Verifies coverage and e-signs authorization

First, they verify the information you entered about them on the drop-ticket[2] and e-sign authorization for us to collect the data we need and to deliver the policy online.

- HIPAA
- Authorization to Disclose
- E-sign and E-delivery Consent
- Privacy Notice

Electronically signs and submits completed application and gets real-time decision

Our easy-to-complete, interactive questionnaire gathers your client's financial, lifestyle and medical history while Symetra's integrated underwriting system is simultaneously at work to deliver your client a real-time decision:

- Instant approval
- Accelerated underwriting, or
- Full underwriting

Congratulations!

Your application for Symetra SwiftTerm is approved!

Complete these 3 easy steps to "Get Coverage."

Digital Onboarding

e-acceptance, e-payment and e-delivery

CLIENT

Review policy offer

Continue

No thanks

We're sad to see you go! Every bit of feedback helps!

Client reviews the offer for coverage. If everything looks good they hit continue to create their account and make their payment or no thanks to decline. If they elect to decline, the client is presented with a brief survey to help us understand why (from doesn't fit their budget to needing more time to think about it).

Confirmation and Reminder emails: If they elected to decline coverage, you and your client are immediately emailed confirmation with a reminder that the offer remains open for 14 days from the date of the policy offer. Reminders are emailed intermittently until the offer is accepted or expires.

Create an account
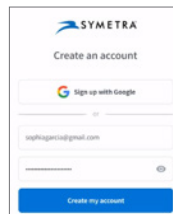
Client creates their SwiftTerm account and verifies their identity with the last 4 digits of their Social Security number.

Make payment

Easy payment via our secure online portal.

Client sets their payment frequency, method of payment and then reviews and completes the payment.

Thank you! Welcome to SwiftTerm
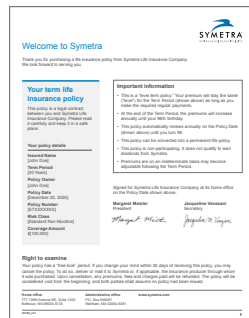
Welcome!

Payment is confirmed and the policy is delivered from start to finish in as little as 25 minutes! A confirmation email is also sent to the client with a link to the SwiftTerm self-service portal to maintain their policy.

View your policy (PDF)

Continue to account

Self service portal

Clients can easily manage their Symetra SwiftTerm policy online through the SwiftTerm self-service portal at www.SwiftTermLife.com.

Designed for ease-of-use, the portal provides coverage and policy details including riders, next payment date, term end date and beneficiary information.

Clients can view their policy, recent transactions, annual statements, and make updates online to:

- Payment and billing frequency
- Contact information
- And more!

Insurance professionals can monitor their client's SwiftTerm policy through Symetra's life insurance portal on Symetra.com.

Contact us today to learn how Symetra SwiftTerm can help you to serve more people.

Symetra Life Sales Desk
1-877-737-3611
Weekdays, 8 a.m. to 6 p.m. ET
lifesales@symetra.com

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