AIG
HOW TO DO NEW BUSINESS

Submission:

· **ALL new business applications MUST** be faxed to 1-800-448-9356 or emailed to the Ogletree Financial Services processing center at info@ogletreefinancial.com

· Please be sure to include your email address, as this will be how you are notified that the application has been received and given a policy number.

· **DO NOT SEND NEW APPLICATIONS DIRECTLY TO AIG!**

Checking Case Status:

· Agents are **required** to register at www.aiglifebrokerage.com from here you will be able to see any and all updates on each case. You can also email the UW team from here. This is your **ONLY** direct access with AIG.

· If you haven't been able to handle the UW via the website- you can email the processing center at info@ogletreefinancial.com or you can call 334-209-0541. Please remember- **agent's are required to check the website before calling**. Please allow 24 hours for all responses.

· Please be sure to have the policy number and client name available during all correspondence.

Requirements:

· **ALL** requirements should be faxed to the processing center with a cover sheet indicating the client name and policy number.

How to submit monies to AIG:

· Please wait for the processing center to email you the policy number assigned and write this in the MEMO section of the check.

Over night checks should be sent to:
American General
Midwest Operations Center
750 West Virginia Street
Milwaukee, WI 53204

Checks sent regular mail should be sent to:
American General
Midwest Operations Center
PO BOX 401
Milwaukee, WI 53201-0401

· **Do NOT send checks without a policy number. This could delay issue!**

Processing Center

Guide to doing business

Welcome to
The
Processing Center

Mission: To help agents get paid faster by assisting agents in submitting, troubleshooting and delivering new business.

We are available
Monday through Friday 8:30 a.m. to 5:30 p.m. (est)

By Phone: 334-209-0541

By Fax: 800-448-9356

Or

Online: www.ogletreefinancial.com

Processing Center
Work Flow Chart

Agent submits new application

Processing Center Receives Application

1. Review app for major omissions
2. Agent is called/emailed on incomplete applications

Application Imaged to Ins. Company

1. Complete Applications are assigned policy #s and imaged to insurance company
2. Incomplete Applications with no response within 24 hours are sent to insurance company incomplete.
3. Agent is sent email confirmation

Updates are Received

1. We receive update from insurance carriers on all imaged cases
2. Updates are automatically emailed to agent

Agent Must Follow-up

1. Agent must check email & website for updates
2. After checking email/websites first, agent can call processing center with questions (all responses returned within 24 hours)
3. Agent must send requirements to processing center

Requirements are Processed

1. Requirements received, checked against carrier, imaged to insurance company
2. Case update sent to agent

Policy issued and mailed to agent

Agent delivers policy to client

Processing Center Responsibilities

1) Receive application via fax/email/mail
2) Verify agent is appointed
3) Review submitted application
    a. Check for missing items
    b. Verify all signatures
    c. Cross reference insurance company requirements
4) Assign policy numbers (AIG/Genworth)
5) Enter data from application and image to insurance company
6) Email agent acknowledgment that application has been processed.
7) Email case updates to agents as they occur (requirements, underwriting decisions, etc.)
8) Troubleshoot case only upon request by agent
9) Return voice mails and email within 24 hours.
10) Process delivery requirements

WE DO NOT CASE MANAGE!

WE ONLY PROCESS THE PAPERWORK AND REQUIREMENTS ON A CASE!

Agent Responsibilities

1) Send complete application including:
    a. Product name
    b. Agent code
    c. All signatures
    d. Face amount
    e. Signed state
2) Send any necessary contracting paperwork
3) Every item faxed/sent to and received by the Processing Center will trigger an automatic email response to agent. If no acknowledgment is received by the agent we did not receive it!
4) Respond to requests for incomplete information within 24 hours. After 24 hours iGROUP must legally send application to insurance company incomplete. Incomplete applications sent to insurance company may result in return of application and premium to client.
5) READ case updates & respond promptly.
6) Check insurance company websites and/or processing center website in between updates.
7) Send us all requirements (include policy number and agent code)
8) Follow-up and track your business.

REMEMBER:

Every item faxed/emailed and received by the Processing Center will trigger an automatic response to agent via email.

No response = We did not receive it !