

## **HOW TO DO BUSINESS WITH ASSURITY LIFE**

### **Submission:**

- All new business applications should be submitted via fax to Ogletree Financial Services, LLC 800-448-9356
- Requirements can be faxed directly to 402-437-4606

### **Checking Case Status:**

- Agents are **REQUIRED** to registered on the ASL website at <https://assurelink.assurity.com/> once they are appointed.
- Agents also have direct access to ASL by calling 866-276-7619 ext. 4264 or by emailing them at [underwriting@assurity.com](mailto:underwriting@assurity.com)
- Be sure to have the client's name and policy number when inquiring.
- Most requirements can be faxed to 402-437-4606

### **Where to submit Monies to ASL:**

- If the agent collects initial premiums with the application, they should be mailed in with the application.  
OR
- If the premium is collected at issue the policy number should be noted in the MEMO section of the check and mailed to:

Assurity Life Insurance  
1526 K Street  
Lincoln, NE 68501-2533  
Attention: Policy Issue/Underwriting

### **Commissions:**

- All questions regarding commissions, please call 866-276-7619.

### **Illustrations and Marketing Support:**

- Please contact your immediate up line or Marketing Representative.
- Agents contracted directly with Ogletree Financial Services, LLC can call Doug Mitchell at 800-466-8186 or email him at [doug@ogletreefinancial.com](mailto:doug@ogletreefinancial.com)
- Please call 866-276-7619 ext. 4333 or email [helpdesk@assurity.com](mailto:helpdesk@assurity.com) for software support.



**(800) 276-7619**



## Assurity contact list

**Sales and Marketing Support** – For product-specific assistance, contact regional sales managers or coordinators. For illustration support, contact your upline manager.

<b>Name</b>	<b>Title/Area</b>	<b>Ext.</b>	<b>E-mail address</b>	
<b>Individual Sales</b>				Fax (402) 437-3404
Pat Kenney	Sales Management (Midwest)	3680	pkenney@assurity.com	
Jesse Brewer	Regional Sales Manager (East)	4628	jbrewer@assurity.com	
Jessie Bartholomew	Regional Sales Manager (West)	4622	jbartholomew@assurity.com	
Tim Haynes	Regional Sales Manager (South)	4680	thaynes@assurity.com	
Eric Teply	Regional Sales Coordinator	3559	eteply@assurity.com	
Barbara Smith	Regional Sales Coordinator	4434	bsmith@assurity.com	
Christy Magorian	Regional Sales Coordinator	4467	cmagorian@assurity.com	
Cori Mooberry	Regional Sales Coordinator	4411	cmooberry@assurity.com	
Judi Ubben	Individual Sales Assistant	3681	jubben@assurity.com	
<b>Business Sales</b>				
Brian Watkins	Regional Sales Manager	(404) 643-4252	bwatkins@assurity.com	
Wayne Martinez	Regional Sales Manager	(719) 287-3726	wmartinez@assurity.com	
Jamie Leon	Regional Sales Manager	(443) 226-5456	jleon@assurity.com	
Karen Lococo	Regional Sales Coordinator	4492	klococo@assurity.com	
Brandon Fields	Regional Sales Coordinator	3780	bfields@assurity.com	
Rose Schamber	Business Sales Assistant	3687	rschamber@assurity.com	
Tim Cowell	Assurity Advisors Reg. Sales Manager	4695	tcowell@assurity.com	
<b>Product Specialists</b>				Fax (402) 437-3404
Ken Smith	CI, DI and HI Insurance (Indiv. and Bus.)	4409	ksmith@assurity.com	
Debbie Patterson	Long-Term Care Insurance (Individual)	3774	dpatterson@assurity.com	
Troy Branch	Life Insurance (Individual and Business)	3688	tbranch@assurity.com	
<b>Licensing and Contracting</b> – Calls from producers regarding the status of their agent contract or appointment:				
Contracting		4689	contracting@assurity.com	Fax (402) 437-3865
<b>Supplies and Illustration Software</b>				
For <i>fastest</i> turnaround, please order using AssureLINK ( <a href="https://assurelink.assurity.com">https://assurelink.assurity.com</a> – go to Forms/Supplies).				
Direct calls from producers requesting supplies and software to:				
Supplies		4447	supplies@assurity.com	Fax (402) 437-3814
<b>AssureLINK Assistance</b>				
Calls requesting assistance in logging on to AssureLINK:				
Help Desk		4333	helpdesk@assurity.com	
Navigating AssureLINK		4275	sales@assurity.com	
<b>Underwriting</b>				
New Business Contact Center		4264	underwriting@assurity.com	Fax (402) 437-3810
	Pending requirements			Fax (402) 437-4606
	<b>New apps only</b>		appssubmit@assurity.com	Fax (877) 864-6630
Quotes and Illustration questions		4275		
<b>Commission Questions</b>		4427	commissions_unit@assurity.com	
<b>In-Force Policies</b> – Questions concerning all in-force policies				
Client Services Contact Center		4279	clientservices@assurity.com	Fax (402) 437-4658



Name \_\_\_\_\_ Date \_\_\_\_\_

Company \_\_\_\_\_ E-mail \_\_\_\_\_

Street Address (No P.O. Box, please) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP+4 \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Assurity Agent No. \_\_\_\_\_

OFFICE USE ONLY
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You must indicate the quantity of each item ordered. All forms and brochures are also available on AssureLINK—<https://assurelink.assurity.com>

ASSURITYBALANCE® CRITICAL ILLNESS	Form Number	ASSURITYBALANCE® DISABILITY	Form Number
_____ Critical Illness Broker Kit	State: _____	_____ Broker Disability Overview Kit	State: _____
_____ Critical Illness Survival Video (9 min)	MKT CI 218	_____ DI product Overview <i>Agent Brochure</i>	15-072-02251
_____ Critical Illness <i>Consumer</i>	15-035-02251		
_____ Critical Illness AZ <i>Consumer</i>	15-035-02251 AZ	<b><u>Individual DI Protection</u></b>	
_____ Critical Illness GARMN <i>Consumer</i>	15-035-02251 (07/10)	_____ Individual DI <i>Consumer</i>	15-042-02201
_____ Critical Illness <i>Consumer</i> (Spanish)	15-035-02251 SP	_____ Individual DI <i>Agent Spec Sheet</i>	15-044-02201
_____ Critical Illness <i>Spec Sheet</i>	15-026-02241		
_____ Critical Illness AZ <i>Spec Sheet</i>	15-026-02241 AZ	<b><u>California Personal DI</u></b>	
_____ Critical Illness GARMN <i>Spec Sheet</i>	15-026-02241 (08/10)	_____ California DI <i>Consumer</i>	15-076-02201 CA
_____ Critical Illness PA <i>Spec Sheet</i>	15-082-02291 PA	_____ California DI <i>Agent Spec Sheet</i>	15-078-02201 CA
_____ Simplified Critical Illness <i>Spec Sheet</i>	15-027-02291	_____ California DI <i>Agent Tri-fold</i>	15-080-02201 CA
_____ Simplified Critical Illness AZ <i>Spec Sheet</i>	15-027-02291AZ		
_____ Simplified Critical Illness GARMN <i>Spec Sheet</i>	15-027-02291 (08/10)	<b><u>Florida Personal DI</u></b>	
_____ Simplified Critical Illness PA <i>Spec Sheet</i>	15-083-02291 PA	_____ Florida DI <i>Consumer</i>	15-077-02201 FL
		_____ Florida DI <i>Agent Spec Sheet</i>	15-079-02201 FL
		_____ Florida DI <i>Agent Tri-fold</i>	15-081-02201 FL
<b><u>Acci-Flex</u></b>			
_____ Acci-Flex <i>Consumer tri-fold</i>	15-129-01171	<b><u>Business Overhead Expense DI Protection</u></b>	
_____ Acci-Flex <i>Consumer tri-fold</i> (AZ)	15-129-01171AZ	_____ Business Overhead Expense <i>Consumer</i>	15-052-02211
_____ Acci-Flex <i>Consumer tri-fold</i> (Spanish)	15-129-01171SP		
_____ Acci-Flex <i>Agent Spec Sheet</i>	15-275-01171	<b><u>Graded Benefit DI Protection</u></b>	
		_____ Graded Benefit DI <i>Consumer</i>	15-067-02231
		_____ Graded Benefit DI <i>Agent Spec Sheet</i>	15-068-02231
		<b><u>Simplified DI</u></b>	
		_____ Simplified DI <i>Consumer</i>	15-217-02181
		_____ Simplified DI Idaho <i>Consumer</i>	15-217-02181 ID
		_____ Simplified DI <i>Agent Spec Sheet</i>	15-218-02181

**Four ways to order!** \_\_\_\_\_

**FOR FASTEST ORDER FULFILLMENT—**  
**One-day turnaround—order online at:**  
 AssureLINK (<https://assurelink.assurity.com>) Forms/Supplies

**Two-day turnaround options—send order to:**  
**E-mail -** [supplies@assurity.com](mailto:supplies@assurity.com)  
**Fax -** (402) 437-3814  
**Mail -** Assurity Supply Dept. • PO Box 82533 • Lincoln, NE 68501-2533



**ASSURITY LIFE**  
**Requisition For Supplies (Page 2)**

You must indicate the quantity of each item ordered. All forms and brochures are also available on AssureLINK—<https://assurelink.assurity.com>

GENERAL MARKETING	Form Number	LIFESCAPE® LIFE	Form Number
_____ Trust Flyer <i>Consumer</i>	15-508-00000	_____ LifeScape Overview Broker Kit	
_____ Annual Report	15-329-00000	_____ Lifescape® All Product overview	15-011-05001
_____ AM Best Report		_____ Senior Products Brochure <i>Agent only</i>	15-238-05051
_____ Assurity Advantage <i>Agent only</i>	15-224-05051	_____ Whole Life <i>Consumer</i>	15-010-01101
_____ Asset Location Record	15-015-00002	_____ Whole Life <i>Agent Spec Sheet</i>	15-106-01101
_____ Assurity Return Envelopes (4"x10")	13-353-00005	_____ Whole Life <i>Consumer Flyer on Term Rider</i>	15-276-01101
_____ Assurity Return Envelopes (9"x12")	13-371-00005	_____ Single Premium Whole Life <i>Consumer</i>	15-806-01101
_____ Requisition for Supplies/Applications ( <i>order form</i> )	05-039-05001	_____ NonMed Term 350 Life <i>Consumer</i>	15-249-01111
		_____ NonMed Term 350 Life <i>Consumer (Spanish)</i>	15-249-01111SP
		_____ NonMed Term 350 Life <i>Agent Spec Sheet</i>	15-250-01111
		_____ Term 350 Plus Life <i>Consumer</i>	15-251-01111
		_____ Term 350 Plus Life <i>Agent Spec Sheet</i>	15-252-01111
		_____ NonMed Term 350 Life Mortgage <i>Consumer</i>	15-253-01111
		_____ Whole Life <i>Consumer</i>	15-010-01101
		_____ Whole Life <i>Agent Spec Sheet</i>	15-106-01101
		_____ Simplified Life <i>Consumer</i>	15-145-01121
		_____ Simplified Life <i>Agent Spec Sheet</i>	15-257-01121
		_____ Universal Life <i>General Consumer</i>	15-900-01131
		_____ Select UL (specific) <i>Consumer</i>	15-907-01131
		_____ Premier UL (specific) <i>Consumer</i>	15-908-01131
		_____ Assured Income Protector <i>Consumer</i>	15-008-03321

**ASCENTIAL ANNUITY**

_____ Secure 3, 5, 7 <i>Consumer</i>	15-164-03311
_____ Secure 3, 5, 7 <i>Agent Spec Sheet</i>	15-163-03311
_____ Annuity Comparison Flyer <i>Agent Spec Sheet</i>	15-181-03351
_____ Encore Annuity <i>Consumer</i>	15-174-03371
_____ Encore Annuity <i>Agent Spec Sheet</i>	15-175-03371
_____ Plus One Bonus <i>Consumer</i>	15-107-03391
_____ Plus One Bonus <i>Agent Spec Sheet</i>	15-162-03391

**PLEASE NOTE:** Software is NOT included in kits. **Illustration software can be downloaded** from AssureLINK under the Illustrations tab or you may order below ↓

**ILLUSTRATION SOFTWARE**

_____ Foresight (GBDI, UL, AIP) (Illustrations, Product Guides & Occupational Schedules)
_____ Life Portraits (All products, except those on Foresight) <b>Limit 5</b>

Please use this area for requesting supplies not found on this order form

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

All forms and brochures available on AssureLINK—<https://assurelink.assurity.com>





**ASSURITY® LIFE INSURANCE COMPANY**

Post Office Box 82533, Lincoln, NE 68501-2533  
(800) 276-7619 Ext. 4447 • Fax (402) 437-3814

**REQUISITION FOR APPLICATIONS**

Name \_\_\_\_\_ Date \_\_\_\_\_

Company \_\_\_\_\_ E-mail \_\_\_\_\_

Street Address (No P.O. Box, please) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP+4 \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Assurity Agent No. \_\_\_\_\_

OFFICE USE ONLY

You must indicate the quantity of each item ordered and the state you are doing business in. Not all products are available in all states.

All forms are also available on AssureLINK—<https://assurelink.assurity.com>

Health Applications	State	Life Applications	State
_____ Individual Disability Income (DI)	_____	_____ Whole Life (WL)	_____
_____ DI Business Overhead Expense (BOE)	_____	_____ Term 350/Non Med Term 350	_____
_____ Graded Benefit Disability Income (GBDI)	_____	_____ Universal Life (UL)	_____
_____ Simplified Disability Income (SDI)	_____	_____ Single Premium Whole Life (SPWL)	_____
_____ Critical Illness (CI)	_____	_____ Reversionary Annuity (AIP)	_____
_____ Simplified Critical Illness (SCI)	_____	_____ Simplified Whole Life (SWL)	_____
_____ Acci-Flex Term	_____	_____ TeleApp Life WL/UL	_____
_____ TeleApp DI	_____	_____ TeleApp SPWL	_____
_____ TeleApp CI	_____	_____ TeleApp Term	_____

Annuity Applications	State
_____ Plus One	_____
_____ Encore Bonus	_____
_____ Secure 3 5 7	_____

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All forms and brochures available on AssureLINK—<https://assurelink.assurity.com>





# AssureLINK


## SUPPLY ORDERING SYSTEM

### Sales Materials

1. To order **sales materials**, choose "**Forms/Supplies**" from the main **AssureLINK** navigation bar, then choose "Order Supplies" from the upper left module on that page.
2. Navigate using selections from the left column list and clicking on items that appear following your list item selection to arrive at specific desired supply type.
3. When you find a supply item you wish to order, click on the "**Name, Image icon or ...More Details**" of that item to arrive at the "Details" screen (where "Add to Cart" is located). Key in desired quantity (keeping in mind any "Max. quantity" notes displayed in details) and click "**Add to Cart.**"
4. Once you add an item to your cart, the "View Cart" button appears. (**NOTE:** You will use this button to review added items and access the "Proceed to Checkout" option — upon completing your ordering session.)
5. You are now ready to browse for more items or go to checkout (**NOTE:** Repeat steps **3-4** when ordering any additional items). To go to "Checkout," click the "**View Cart**" button and select "**Proceed to Checkout.**"
6. You will be prompted to indicate the shipping address for your order along with general information. (**NOTE:** Use care entering shipping information so errors will not delay your order.)
7. Confirm order by selecting "**Confirm Order and Continue**" then "**Continue**" on the Invoice screen.
8. **Congratulations!** You have placed your order on the **AssureLINK** supply ordering system. **YOU WILL RECEIVE AN ORDER CONFIRMATION E-MAIL** (to the e-mail address on file) and subsequent e-mails notifying you of order acknowledgement and shipping status.

### Applications

1. To reduce errors, speed up Assurity's application process and receive commissions more quickly, we recommend distributors use our electronic applications (E-Apps). E-Apps can be found on the upper right side of most **AssureLINK** pages.
2. To download and print applications directly from **AssureLINK**, go to the "**Forms/Supplies**" tab from the main **AssureLINK** navigation bar and click on the link "**click here to access applications and service forms.**"
3. To order applications, select choose "**Forms/Supplies**" from the main **AssureLINK** navigation bar, then choose "Order Supplies" from the upper left module on that page. Select "**Applications**" and select either the COMBO application or choose from the products listed on the left-side navigation bar. Follow steps 1-8 above to complete the ordering process.



Before you  
order paper apps, try  
**Assurity's E-Apps.**  
on AssureLINK!  
It's fast and easy!