

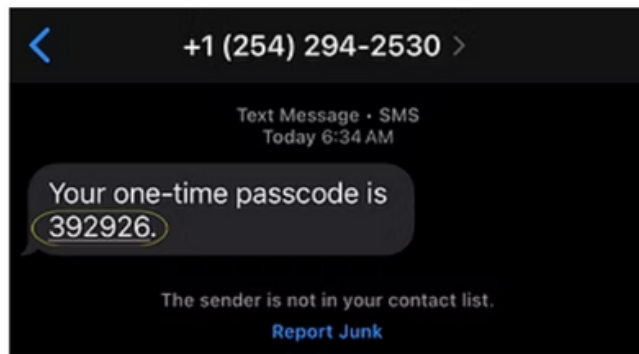


# AMERICAN-AMICABLE GROUP OF COMPANIES TEXT CODE GUIDE

## STEP 1



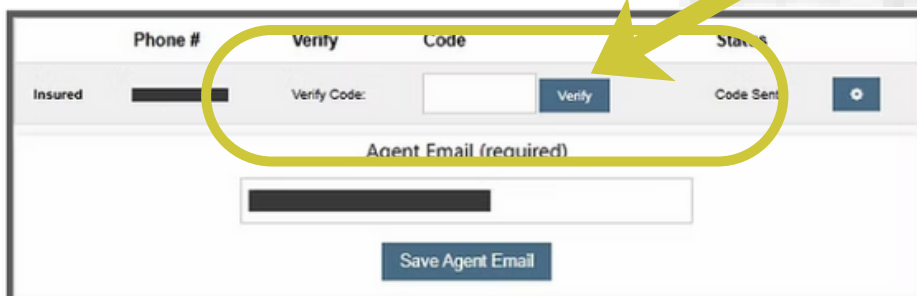
- Choose the **TEXT** method signature option. Voice Recording method would be secondary **if the client doesn't receive texts messages to their phone.**



- Re-enter the **INSURED'S phone number.**
- Click the "**SEND CODE**" button

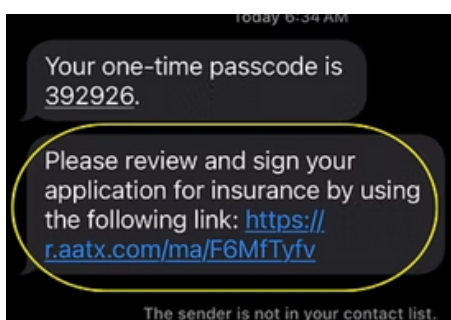
*The photo shows what the applicant will see on their phone*

## STEP 2



- Enter that **"CODE"** in the box and then click "**VERIFY**".
- NEXT, enter **YOUR** email and click the "**SAVE AGENT EMAIL**" button.

## STEP 3



- Your applicant will receive a 2nd text
- Click the **link**
- Walk them through the rest of the signature process using the script.

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## STEP 4

- This is what the client will see when they click the link
- Client enters the last 4-digits of their SSN
- Click **Login**

- These are the documents client will see
- Have them scroll down to the bottom



# AMERICAN-AMICABLE GROUP OF COMPANIES TEXT CODE GUIDE

You are ready to sign! Type your full name in the box provided below, then click the submit button. I acknowledge that my signature below represents signing all signatures in the application package, including all the pages shown above.

Full Name

Submit

- Have client click the white box
- Type their Full Name
- Click **Submit**

insuranceapplication.com



## Web App eSign

👍 Thanks! We've recorded your signature and will process the application as soon as possible.

You're done, please close this window.

- This is what client will see after submitting their name

***Agent continues with application on their computer***

**IF YOU DO NOT HAVE THAT  
PARTICULAR STATE'S LICENSE  
GO TO NEXT PAGE**





AMERICAN-AMICABLE  
GROUP OF COMPANIES

# TEXT CODE GUIDE

## IF YOU DO NOT HAVE THAT PARTICULAR STATE'S LICENSE

- Fill The Application As Normal.
- Once, client finishes up signature process.
- Click Ready to submit the application.
- Once, the loading engine is done. Make sure the policy has been approved on the screen.
- **Do NOT** answer any of the questions or CLICK finish.
- Once you receive the license as accepted in your email.. go back to the portal and submit the policy by clicking **NO** and the **FINISH** button. **Deadline is 7 days.**



AppNumber: 002802790

Decision: Based on data results of the case, the proposed insured is medically eligible to apply for the Immediate Death Benefit Plan. Final approval<sup>1</sup> will be made promptly upon review of the previous applications submitted to the Company.

Would you like to provide additional information along with this application?

☐ Yes

☐ No

FINISH

**Protip: If AmAm declines, wait to write TransAmerica or Ethos once the license gets accepted.. call the client back for the codes. Just let them know you may reach out if you need anything further just for a heads up.**