

Important Information for



Insurance Company

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For Problems or Questions call: **1-877-341-3342** (toll-free) or email: van@theusbroker.com

Online Chase Appointment is EASY & FAST.

<https://ww2.chaseinsurancecompany.com/zappoint/start?u=w&id=4USFMG>

New York appointments require you to fax in the Solicitor Agreement to:

FAX#: 847-874-0639 Fill in the GA code as: 4USFMG

Agent ID is your SSN

Fax Chase Appointment Paperwork to: (315) 655-4784 - Attn: Chase Contracting Department

For Sales Questions or Specific Chase Product Questions call:

Chase Insurance Life Insurance Company

1-866-339-2477

Ask for TheUSBroker Sales Support Team

To Mail Premium Checks to the home office – include policy # on check to:

Attn: PMT

Chase Insurance,

2500 Westfield Dr.

Elgin, IL 60123-7836

To Get Return of Premium Complete T Illustrations, visit:

http://www.chaseinsurancecompany.com/agents/rep_agency_fipsc01.asp

To gain access your General Agency is '**USFMG**' and the Password is '**starlink**'

Chase Insurance is an ideal product for Banks and Financial Institutions. Please review our website for additional sales ideas (Rate of Return on ROP, Cash Value Term, etc.) and more information about bank marketing.

Chase Insurance will really drive your business. Call us if you have questions or if we can help.

TheUSBroker Chase Insurance Team

STEPS TO GET PAID – CHASE LIFE

1. Get Appointed Online through EZ-Appoint

Go to www.theusbroker.com, choose to go to “Chase Insurance” webpage and click on link called “Get Appointed Online through EZ-Appoint”. NY appointments require you to fax in the Solicitor Agreement to **FAX#: 847-874-0639** (Fill in the GA code, 4USFMG, on the agreement before faxing it to Chase) Your Agent ID will automatically be your SSN.

2. Enroll in EZ-App by Setting Up User Name & Password

Approximately 48 to 72 hours after completing your EZ-Appoint agent appointment, go to www.theusbroker.com then the Chase webpage and click on link “Submit Preliminary Applications Online”. Located above the username and password log in choose “*enroll now*”. Complete fields by typing in your SSN as your agent ID. You will immediately receive a response via email. Your default user name will automatically be the initial of your first name and complete last name unless you change it at this point.

3. Enroll in Starlink

Go to www.theusbroker.com Click on link “Register for StarLink to Track Pending Business”, complete form and submit online (*allow 48 hours to process*). It is **required** that you track your pending business. You will only be advised of pending case status by your checking Chase’s StarLink webpage periodically.

4. Submit Application Online through EZ-App

Go to www.theusbroker.com and click on link “Submit Preliminary Applications Online” EZ-App. Enter Username and Password. Follow process to complete application on line. You will be notified immediately of policy number. No signature is required at this time. The client will receive phone call from paramed and be expected to sign formal application at time of exam with paramed serving as “witness” to their signature. Blood and Urine Specimen results will be emailed to Zurich Life from Osborn Labs.

5. Points to Remember

Accurately quote your clients’ coverage by using the Quick Quote link on www.theusbroker.com. If it looks like the rate class may be different than what was quoted when Chase’s TeleLife interviewer calls your client to complete the Parts I and II of the application, they will refer the client back to you as the writing agent to discuss further.

TheUSBroker's Handy Tips for Working with Certain-T Life

1. Policy fees are non-commissionable and are \$60 for policies under \$250,000 face amounts and \$50 for policies over \$250,000 face amounts.
2. There are 4 rate bands for the Certain-T Term products:
 - Band One: \$50,000 - \$99,999 face amounts
 - Band Two: \$100,000 - \$249,999 face amounts
 - Band Three: \$250,000 - \$999,999 face amounts
 - Band Four: \$1,000,000 face amounts and higher
3. Coffee Apps! If you are not near your computer or don't use one, call your MGA's office and give the pre-application information over the phone to have your MGA submit online via EZ-App
4. Chase Insurance Life Glossary of Terms:
 - EZ-Appoint – online agent appointment process
 - EZ-App – online pre-application submission
 - StarLink – online pending business tracking website
 - Pre-Application – simple online (EZ-App) or paper (TeleApp) preliminary form to instruct Chase's TeleLife department to phone the proposed insured and getting the formal application process started.
5. You can fax the pre-application to Chase's TeleLife department: FAX: 1-888-615-9619
6. Here is the weblink to get Chase forms (including TeleApps by state) to be faxed to the TeleLife department:
<http://nettrac3.ipipeline.com/link.asp?cin=1502&npt=49>
7. Questions? Call the Chase Help Desk Toll Free Hotline:

1-866-339-2477 between 8 AM to 5 PM CST