

Equitable e-App at a Glance

Using the Equitable e-Application option helps to reduce the possibility of missing form, shorten the cycle time of cases, route cases to Underwriters quicker and helps Producers get paid faster.

Here is a quick, step by step guide describing how to submit an e-App

- Log into our agent website, www.equitable.com
- Access e-App Portal
 - On 'MY BUSINESS' tab, click on 'Visit Life e-App Center', then select the 'Click Here' button, OR
 - Run an illustration on AEGIS Web and click on 'Life e-App' when the illustration is complete
- On the iPipeline screen, click on 'Start New Case'
- Complete the required fields, including state of issue and product
- When the product list appears, click on the '**Select**' button under **iGO e-App**
- Enter in the Face Amount and if the case is a term conversion, then click the box for Term Conversion
- Complete all the information, including the BGA Code that the agent is submitting the case through
- After a screen has all the required information complete, the red question mark (?) will change to a green check mark (✓)
- When all information is complete, the agent may lock the application
- Select Electronic Signature
 - Choose 'Remote' for e-Signature
- Fill out agent information and email of client
- Client will receive a link to electronically sign the application

Your client will receive a personalized email message on how to gain access to their electronic application and the necessary steps that must be complete to collect their electronic signature.

Once you hit 'Finish' the application is transmitted to Equitable New Business for processing.

If the agent wants to complete other requirements using an electronic signature platform, the agent will need to have their own DocuSign Account. For more information on utilizing DocuSign, please refer to guidelines or contact RVP.



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