Send to Client
makes the eApp process easier than ever

At Equitable, we're always looking for ways to make our products and services better — and make your life easier. That's why we've created the Send to Client feature.

What is Send to Client?

A simpler way to obtain clients' personal history or medical conditions during the eApp process.

Why use Send to Client?

Easier for you

No medical information questionnaire to fill out with clients.	No awkward conversations with your clients about their medical conditions.	Fewer forms to complete with clients.

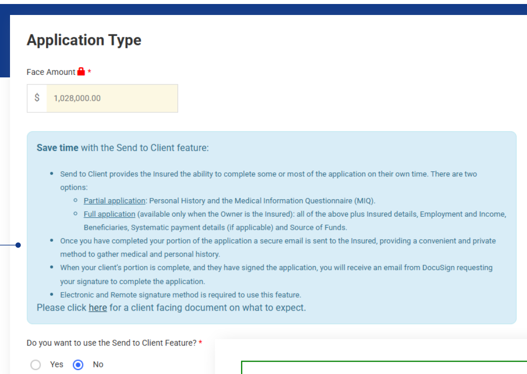
Better for your clients

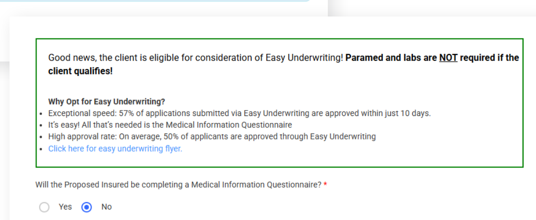
Faster approvals so they're protected sooner.	Greater accuracy because they're the ones filling in the information.	More convenience because they can complete it on their own time.	Simple, straightforward approach.

Plus, our experience has shown that having the client fill out the personal history and medical questions means there's a greater likelihood of the application being completed in good order.

Here's how Send to Client works

You can elect to send your clients the **personal and medical history questionnaire** to fill out themselves prior to signing the application. You'll see a screen like this:





Use this **step-by-step flyer** to guide clients on completing their **Send to Client.**

FAQs about Send to Client

How will I know when my client has completed their portion of the application?

You will receive the application for your signature.

What if my client doesn't complete the application right away?

Follow-up emails are sent to the client several times, and applications are usually completed within a few days.

(The link will expire in 14 days, so if this happens, you can send a new link to the client.)

How will my client know what information is needed?

When a client has a medical condition, they are generally familiar with the terms that relate to their condition. Using **Send to Client** allows them to look up any information and complete at their own pace.

How will I help manage client expectations about the underwriting process and likely risk class if I'm not involved in the application?

You will be able to see the answers to the questions in the PDF version of the application in Docusign.

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