

How to Submit a Gold Fixed Indexed Single Premium Whole Life E-App

Before you begin, if you have enabled pop-up blocking on your web browser, please disable it. It will interfere with the E-App Process.

To get familiarized with the E-App process, you can log in as a test producer and familiarize yourself with the E-App process. The test username is "testproducer" and the password is "Sagikor".

To log in, go to <http://sagicorlifeusa.com/>

Please take note, any client information you enter while logged in as a test producer, will not be received as an official E-App.

A. Getting Started

1. You must be a registered agent on the Sagikor website in order to submit an E-App
2. Once you log in, click on the link for the Illustration Software under the Account Home menu bar option
3. Click on the blue button labeled "Run Sagikor Life Illustration Software"

B. Start the Illustration

1. From the "Line of Business" dropdown menu select "Life"
2. From the "Product Type" dropdown menu select "Whole"
3. From the "Jurisdiction" dropdown menu select the state where the app will be E-signed
4. From the "Presentation Type" dropdown menu the default is "Standard"
5. In the "Product Name" area of the screen, click on where it reads "Gold Fixed Indexed Single Premium Whole Life"

C. Client Information Section

1. Enter the insured information: First and Last name, gender, and birth date
2. Select the "Risk Information" as either "Standard Non-Tobacco" or "Standard Tobacco"
3. Click on the circle icon with the arrow to proceed.

D. Plan Information Section

1. Complete the section for "Product Information"
2. Complete the section for "Allocation Summary"
3. Complete the section for "Disbursement Information"
3. Click on the circle icon with the arrow to proceed.

E. Producer Override Section

1. Check the checkbox next to "Gold Fixed Indexed Single Premium Whole Life"
2. Select your Report Options by clicking on "Reports Options"
3. Click on the circle icon with the arrow to proceed.
4. Enter your producer information
5. Click on the "Save" button at the upper left of the screen.
6. Enter the options you wish and click save

E. E-App Section

1. From the left menu area section (in light blue) click on "Application", then click "Create Application" button
2. You are now ready to start creating the E-App. At this point 70% - 73% should be complete. You can verify this by looking at the form entry progress bar at the upper left area of the screen. Click on the "Acknowledged" button in the middle of the screen.
3. Click on the green right arrows to continue.

At this point in the E-App process, you will need to complete every field highlighted in **Red**. You will receive a pop up message once you have successfully completed all the required fields. Complete the E-Signature section, then review and finalize the E-App.