

## Case Notes Munch, Jurg

Subject: Agent call-status  
Date Entered: 09/30/2019 02:01 PM

Note: agent called advised need all pages of signed illustration advised page 27 was not signed.

Subject: Acknowledgement to Agt  
Date Entered: 09/23/2019 03:48 PM

Note: From: Stanton, Tiffany  
Sent: Monday, September 23, 2019 3:48 PM  
To: 'MIN ZHU' <min.zhu@tfaconnect.com>  
Subject: RE: Crump - Agt Report / Agent: Zhu, Min Case: Munch, Jurg #18842247

Hello,

& thank you for the Illustration.

I have forwarded it on to the carrier for additional review and processing.

I will advise once the carrier reaches back out to me on moving forward with the application.

Thank you!

Thank you for the business as it is my top initiative to provide excellent customer service!

Tiffany Stanton  
Crump Life Insurance Services  
Case Manager  
Crump: 4135 North Front Street Harrisburg, PA 17110  
Phone: (717)736-8065  
Email: Tiffany.Stanton@Crump.com

\*You may receive a customer satisfaction survey. The survey is short and should only take 1-2 minutes to complete. I would appreciate your feedback on your experience working with me\*

Please let me know if you were happy with the level of service I have provided or if you have any feedback of changes that we can implement to improve our process with future business.

## Case Notes (continued)

Subject: ILL rcvd  
Date Entered: 09/23/2019 03:44 PM

Note: From: MIN ZHU <min.zhu@tfaconnect.com>  
Sent: Monday, September 23, 2019 12:47 PM  
To: Crump Correspondence <PDQPRTSVR@crump.com>; Stanton, Tiffany <Tiffany.Stanton@crump.com>  
Subject: Re: Crump - Agt Report / Agent: Zhu, Min Case: Munch, Jurg #18842247

[\* This email contains attachments or links from an unverified sender. DO NOT open attachments or click links without verifying the sender. \*]  
Please find the attached signed illustration attached.

Thanks,

Min Zhu

Investment Advisor Representative  
Transamerica Financial Advisors, Inc.  
Transamerica Financial Group Division

39355 California Street Suite 201B  
Fremont, CA 94539  
(O) 510.565.1750  
(C) 510.501.4697  
Email: min.zhu@tfaconnect.com

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From: Crump Correspondence <PDQPRTSVR@crump.com>  
Sent: Friday, September 20, 2019 2:23 AM  
To: MIN ZHU  
Subject: Crump - Agt Report / Agent: Zhu, Min Case: Munch, Jurg #18842247

You will need Adobe Acrobat Reader to view the file attachment. You can download the Adobe Acrobat Reader from <http://www.adobe.com/products/acrobat/readstep2.html>. Thank you.

#####  
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? TLS encrypted by Smarsh Business Solutions

### Case Notes (continued)

Subject: Agt - updated o/s reqs  
Date Entered: 09/23/2019 01:01 PM

Note: LOOP CALL - Advised o/s reqs and then transferred to L&C to discuss the contracting status.

1. Please submit an AG Extend IUL illustration so we can process your request.
2. We have an Agent Errors that are being reviewed. For more information on this please contact our Licensing Department at 866-722-2434. Please contact our Licensing Department for additional details AgentSolutions@AIG.com.
3. If policy owner wants to stay with the September effective date, they would need to pay 2 months premium for the term policy (policy only paid 07-28-2019).

## Case Notes (continued)

Subject: Full Case New App Review  
Date Entered: 09/18/2019 10:13 AM

Note: From: Stanton, Tiffany  
Sent: Wednesday, September 18, 2019 10:13 AM  
To: 'min.zhu@tfaconnect.com' <min.zhu@tfaconnect.com>  
Subject: Munch, Jurg / Case# 18842247

Good Morning,

I would like to thank you for the American General Life application on Jurg Munch for the face amount of \$980,000. We have sent the application to the carrier for additional processing. I will be your case manager and will be reaching out to you on a weekly basis to keep you up to date during the application process. If you have any questions or concerns, please contact me at: 717.736.8065 or by email: Tiffany.Stanton@Crump.com at your convenience.

In order to move forward, the following requirements are necessary:

? No requirements necessary at this time. The file is in with the underwriter for review.

Once the carrier has reviewed the application I will contact you with any additional requirements.

Thank you again, I look forward to working with you!

Thank you for the business as it is my top initiative to provide excellent customer service!

Tiffany Stanton  
Crump Life Insurance Services  
Case Manager  
Crump: 4135 North Front Street Harrisburg, PA 17110  
Phone: (717)736-8065  
Email: Tiffany.Stanton@Crump.com

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