

Agent TeleLife® Checklist

TeleLife® Process Required Forms

- ☐ TeleLife® Application
- ☐ Sales Material Form (for NAIC Replacement Regulation Model states)
- ☐ Replacement Form ZKL-1058 (when replacing an existing life contract in non-NAIC Replacement Regulation Model States)
- ☐ Applicable state replacement form (when replacing an existing life contract)
- ☐ Applicable state disclosure notice (if any)
- ☐ If an illustration was used during the sales process, send the NAIC-compliant illustration shown to the applicant, along with the TeleLife® application. (NAIC model illustration states only)

TeleLife® Process Optional Items

- ☐ Personal check, money order or credit card (Visa or MasterCard)
- ☐ Premium Payment Option Form

Do's

- ☐ Provide full details of TeleLife process to applicant using Applicant's Checklist
- ☐ Print application in black
- ☐ Get signatures on face-to-face sales
- ☐ Use pre-qualification questionnaire for accurate premium quotes
- ☐ Fax or mail the completed TeleLife® pre-application and other documents to your Zurich Life general agent.

Don'ts

- ☐ Don't accept or send money on a proposed insured with application(s) totaling more than \$500,000.
- ☐ Don't send partial premiums — full mode premium is needed.
- ☐ Don't use the TeleLife® process if the applicant does not speak English or Spanish.
- ☐ Don't schedule the paramedical exam.

For copies of state specific TeleLife® pre-applications, disclosure, replacement, or other forms, please contact your general agent or obtain them from our Internet site, www.zurichlifeus.com, under the section called "Agents, Brokers and Reps." Click on "Services" and then "Download Forms." Choose the term plan, choose the state, then click on "Forms" and select the items to print.