

With Chase Insurance's TeleLife® program, you only have to spend a few minutes completing the one-page TeleLife preliminary application. You don't need to leave your office, you don't need to get client signatures, you don't need to meet face-to-face with the client - a few minutes and you're done! The TeleLife unit takes care of everything else. They call your client within 48 hours, and during the 15 minute long interview they also make arrangements for the paramed exam.

Your commission percentage is exactly the same - but your profit is much higher with TeleLife. You don't have to drive to meet with the client, sit with him/her, drive back to your office, photo copy and mail the application, order the paramed exam, double check to make sure the exam was done, etc. - all the busy work and expense associated with the traditional submission process is eliminated!

Your (The Writing Agent's) Responsibilities:

- 1) Determine the need
- 2) Pre-screen the applicant
- 3) Provide a quote
- 4) Complete the TeleLife pre-application
- 5) Collect initial premium (optional)
- 6) Provide the applicant with the Chase Applicant's Checklist
- 7) Fax the TeleLife application to CPS
- 17) Deliver the policy to the client and collect any delivery requirements

Note: You (the writing agent) do not order the paramed exam or any other requirements. If you schedule an exam, the case no longer qualifies for the TeleLife process. The case will be returned.

CPS' Responsibilities:

- 8) Verify completeness of the TeleLife pre-application
- 9) Verify agent is licensed
- 10) Fax TeleLife pre-application to One TeleLife
- 11) Receive fax confirmation of receipt within 24 hours
- 15) Provide timely online information to writing agent
- 16) Forward policy to writing agent
- 18) Forward commissions to writing agent

Zurich TeleLife's Responsibilities:

- 12) Contact applicant (usually within 48 hours of receiving TeleLife pre-application)
- 13) Complete TeleLife application interview over the phone
- 14) Send TeleLife application directly to the customer

For more information regarding Chase's TeleLife Program,
contact your CPS Sales Rep