

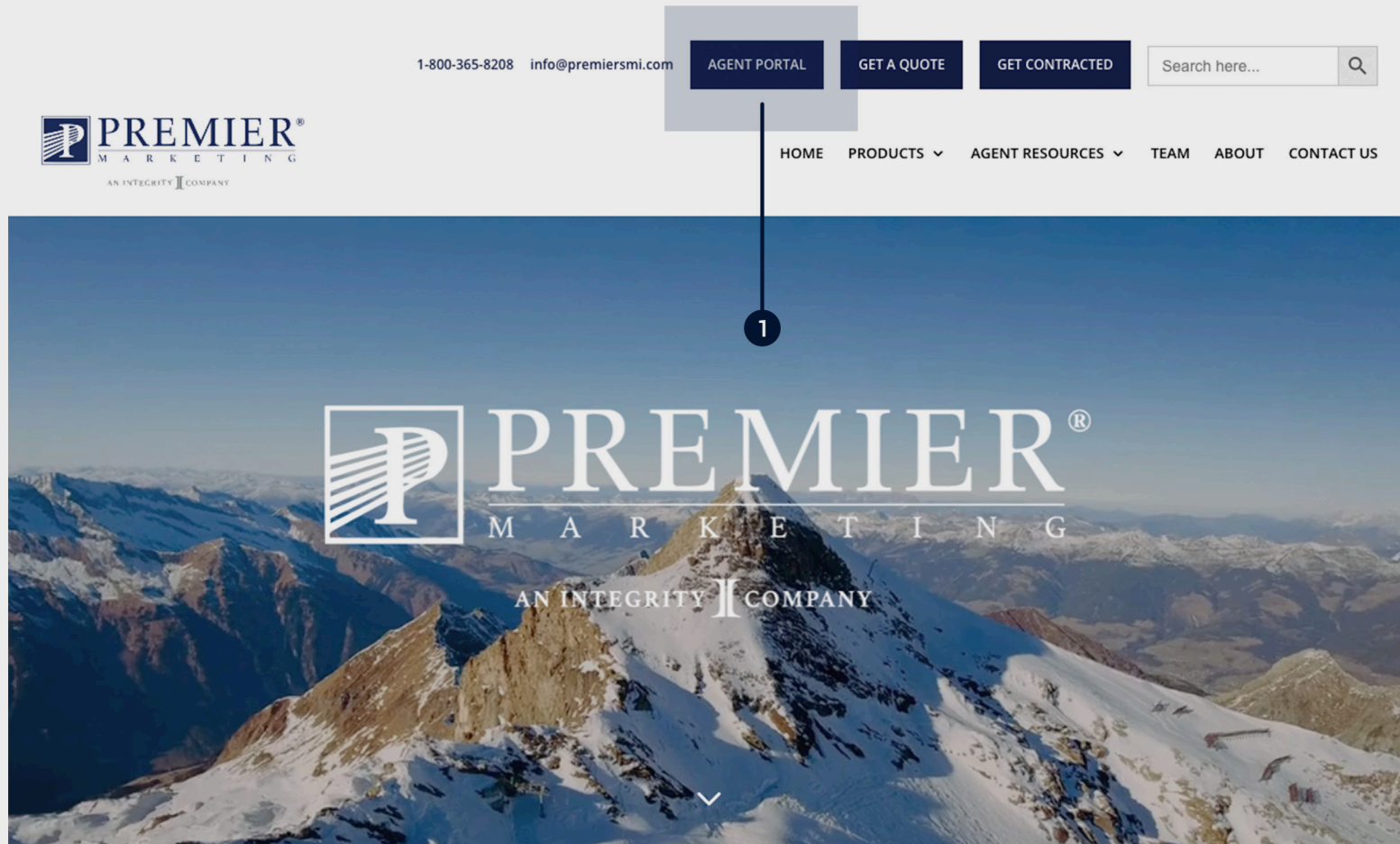
AGENT PORTAL



TRADITIONAL LIFE

# QUOTE INSTRUCTIONS

Premier Marketing's Agent Portal is available 24/7 to make quoting, applying and finding forms quicker and easier. Go to [www.premiersmi.com](http://www.premiersmi.com) and click Agent Portal in the upper Right of the page.



## Logging Into The Agent Portal

Log in with your User ID. First time logging in, click forgot password, you will receive an email from Ipipeline with instructions. If you don't know your User ID, please call 800-365-8208 to obtain.

### AGENT PORTAL

The Agent Portal serves as an agent's online resource to submit new applications, see pending requirements & policy updates, learn of product enhancements, or get licensed with additional products. In addition, from the Agent Portal, agents may download sales/marketing materials, and qualifying agents can check their trip points.

Agents contracted and in good standing with Premier can enter their User ID and Password below to login:

User ID:

Password: 2

Show Password

Login

Forgot your Password? [Click here to Reset Password](#)

Forgot your User ID or default email? Contact your Agent Success Marketer at Premier: 800-365-8208





Once logged in, you will see the screen information to the left. To run quotes, click Lifepipe Quote Engine.

E-App Drop Ticket: You can start Life application here if you don't need a quote. Once in you will see start new case or view my cases to find your life applications you started.

Forms Search/IGO E-APP: Here you will find everything you need in one location such as: new business applications, policy holder service forms, EFT change forms, Beneficiaries, Address changes and more. Plus, you can email forms to your client from here.

Contracts: Need your agent code? Use this feature to find your writing number for each carrier contracted under Premier Marketing.

## Getting Started:

You will see the Insurance Quote: you can add client's name, date of birth to get age of and age nearest. Select Gender and your state for the sale. Death Benefit you can choose up to 3. All Death Benefits start at \$25,000 and up. All quotes show Monthly, Quarterly, Semi and Annually rates.

## Product Types:

**Term:** ART, 10, 15, 20, 25, 30, 35, and 40 years available.

**Term with Simplified Issue:** Non Med Quick Issue term plans. Run Preferred and Standard for all options.

**Guaranteed Universal Life (GUL):** Maturity ages, 85, 90, 95, 100, 105, 110 and 121.

**Guaranteed UL:** Guaranteed death benefit to age 121 or dial back to age 90. Normally does not build cash value.

**Current Assumption UL:** Carriers that allow a Universal Life with current rates. \*

**Indexed UL Accumulation:** Income options.

**Indexed UL Protection:** Cash value at 121. Great option for those who want a Guaranteed Death Benefit with some cash growth.

The screenshot displays the 'Insurance Quote' form, divided into two main sections: 'Client Information' and 'Product Information'.

**Client Information:**

- Name:** Text input field.
- Date Of Birth:** Text input field with the format 'MM/DD/YYYY'.
- Age:** A dropdown menu with 'Actual' selected.
- Nearest:** Text input field.
- Gender:** Radio buttons for 'Male' and 'Female'.
- State:** A dropdown menu with 'NE' selected.

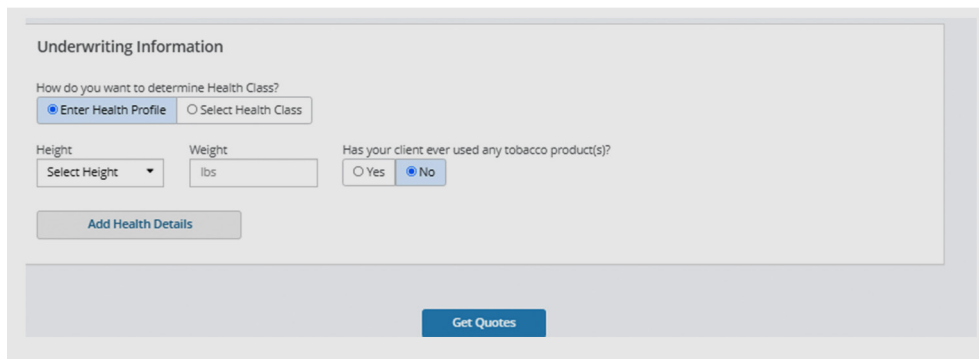
**Product Information:**

- Product Type:** A dropdown menu with 'Term' selected.
- Product Group:** A dropdown menu with 'All Products' selected.
- Term Length:** A dropdown menu with 'Select Term Length(s)' selected.
- Death Benefits:** Three input fields, each containing '\$0'.
- Riders:** A dropdown menu with 'Select Rider(s)' selected.

*\*Full quotes maybe provide in the actions tab next to the premiums.*

## Underwriting Information

Select Health Class if you know how you want to offer a rate for your client. Preferred Best, Preferred, Standard Plus, Standard or Preferred Tobacco and Standard Tobacco. Table Ratings, and Flat extras apply only on standard classes if your client has some health issues.



The screenshot shows a web form titled "Underwriting Information". At the top, it asks "How do you want to determine Health Class?" with two radio button options: "Enter Health Profile" (which is selected) and "Select Health Class". Below this, there are three input fields: "Height" with a dropdown menu showing "Select Height", "Weight" with a text box containing "lbs", and "Has your client ever used any tobacco product(s)?" with two radio button options: "Yes" and "No" (which is selected). At the bottom of the form area is a button labeled "Add Health Details". Below the form area, centered, is a blue button labeled "Get Quotes".

Enter Health Profile if you don't know how to apply. Enter Height and Weight and if they are a tobacco user or past tobacco user. Click add health details if more info on client. More questions if client is on blood pressure or cholesterol meds. Family history for clients that has or has had family members with heart, cancer or diabetes and may have died from the disease. Driving Violations for accidents, license suspensions, DUI/DWI, Moving Violations and reckless driving. Click Quotes to see the carriers available for your client. If doing the Enter health profile, a few carriers do not show up.

## Quote Results

< [Back to Search](#)

Share Quote Save Quote Download

Results (21)

Compare (0)

View By: Monthly Premium

CLIENT INFORMATION  
Valued Client, Age 50, Male, NE

Filter By [Reset](#)

Death Benefits

\$250,000

[+ Add Another](#)

Health Classes

Preferred Best Non-Tobacco

Preferred Non-Tobacco

Standard Plus Non-Tobacco

Standard Non-Tobacco

Standard Tobacco

Preferred Tobacco

Term Lengths

1 Year (YRT)

10 Years

15 Years






20 Years

25 Years

[Show more](#)

20 Years

\$250,000

Carrier / Product	Premium	Apply
<input type="checkbox"/>  <b>BANNER WILLIAM PENN</b> OPTerm Preferred Non-Tobacco Age Nearest: 50 <a href="#">Accelerated Underwriting Eligible</a>	\$45.41/mth	<a href="#">Apply</a>
<input type="checkbox"/>  <b>Protective</b> Protective Classic Choice Term Preferred Age Nearest: 50 <a href="#">Accelerated Underwriting Eligible</a>	\$45.41/mth	<a href="#">Apply</a>
<input type="checkbox"/>  <b>AIG</b> Select A Term Preferred Non-Tobacco Age Nearest: 50	\$48.52/mth	<a href="#">Apply</a>
<input type="checkbox"/>  <b>Lincoln Financial Group</b> TermAccel 2019 Preferred NonTobacco Age Nearest: 50 <a href="#">Accelerated Underwriting Eligible</a>	\$48.80/mth	<a href="#">Apply</a>
<input type="checkbox"/>  <b>Trendsetter Super</b>	\$49.04/mth	<a href="#">Apply</a>

Sample term quotes: If the client likes the quote, click apply to move forward with the application process.

## Options To Write The Application

The options to the right are how you can apply from this site.

**Paper forms:** find your application needed and you can print or email from this location.

**E-application:** your client will need to do an E-signature to approve the application is sent to the carrier. The client may get a telephone interview from the carrier to go over their health. Some carrier's lists under the quotes accelerated underwriting eligible meaning after the telephone interview is done the client may not have to do an exam. If exam is needed they will schedule one for the client. Make sure you check your email for all responses from Ipipeline to continue your portion of the application until the carrier receives.

**Drop Ticket:** Very quick way to enter basic client information. The carrier will call to complete the application and health with your client and may not have to do an exam. If one is needed the carrier will schedule one for your client. The client will need an email address. Continue to check your emails from ipipeline until carrier receives application.

