

Sprint to the Finish with Prudential

2011 Year End Deadline

12/20/2011: All delivery requirements (In Good Order), including the premium, must be received by Prudential no later than 12/20/2011 in order to receive compensation in 2011.

Key Reminders for a Winning Year End

Help Us Identify Critical Cases and Informals: Provide a list of critical live or informal cases to your dedicated Prudential Account Representative and we will prioritize the cases for year end.

Make the Subject Line of Emails Clear: Include “YE” or “Year End” in the subject line of emails, along with the policy number.

Take Cover: Use your new business transmittals or cover letters to communicate important case information to help the underwriter better understand the “full picture” of the case.

Make sure it's In Good Order (IGO): Ensure application information and requirements are included at case submission in order to see a faster turnaround time and placement.

Utilize Case Status Tools: Determine if additional requirements are needed for the case to be placed in force, including:

- Check Status: Key status tools include proactive case status emails, your Agency Management System, and www.pruxpress.com.
- Expedite Handling: Image or fax requirements, and use Two-Way Communication (via www.pruxpress.com, Oracle, EBIX, or Agency Works) to **expedite** and **simplify** requirement submission.

Be Proactive:

- ▶ Scrub delivery requirements and proactively obtain missing information.
- ▶ Follow cases through to confirm placement via status tools.

Questions? We're Here to Help!
Contact Your Dedicated Prudential Account Representative.

Delivery Requirements Key Tips & Commonly Missed Requirements

Cover Letter & Mode Changes

- ▶ Clearly identify mode changes in the cover letter.

Policy Changes

- ▶ Make sure all changes are initialed by the policyowner.

Delivery Application

- ▶ Ensure IRS Certification boxes are checked, as appropriate.
- ▶ Submit all pages, including the Part 2 and applicable supplements.
- ▶ Make sure the correct signature and title are on the trust- or corporate-owned policies.

10164 Amendment

- ▶ Make sure the correct signature and title are on the trust- or corporate-owned policies.

Good Health Statement

- ▶ Please return this signed form on all non prepaid cases.

Policy at a Glance

- ▶ Ensure policyowner's signature and title, broker's signature, and date are included.

E-Pay/EFT Form

- ▶ Complete Section One on the E-Pay/EFT form to draft the initial premium at delivery on all modes. Complete Section Two for ongoing withdrawal of monthly premiums.

Checks

- ▶ Include policy number(s) on checks and clearly indicate if premium is to be split between multiple policies.

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