

Firelight Instructions

Go to our website at <https://innovativeunderwriters.com/>

Choose E-submissions and you will see Firelight E-apps for Annuities

To complete a new application click on:



- Select State (Jurisdiction)
- Product Type
- Carrier

Click Create button and name your application

Enter Data from one page to another and fill in all information

Top right corner under open will show you what fields are required to be completed and then click the "x" to close

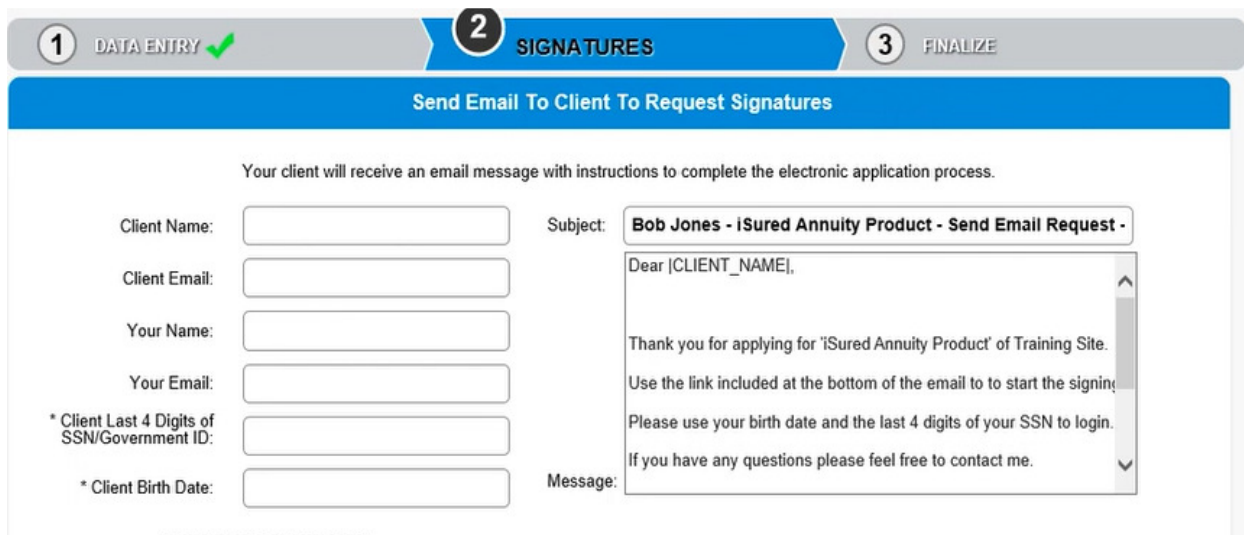
When application is completed the Data Entry (1) will show 100%

Then move to Electronic signature (Use E-signature)

Once you click the application you will lock the application.

Next click "Send Email Request" option for client to sign the application.

Provide the information on the left hand side of the screen.

A screenshot of a web form titled "Send Email To Client To Request Signatures". The form is part of a three-step process: 1. DATA ENTRY (checked), 2. SIGNATURES (active), and 3. FINALIZE. The form contains several input fields for client and user information, a subject line, and a message body. The subject line is "Bob Jones - iSured Annuity Product - Send Email Request". The message body is a template email starting with "Dear [CLIENT_NAME],".

1 DATA ENTRY ✓

2 SIGNATURES

3 FINALIZE

Send Email To Client To Request Signatures

Your client will receive an email message with instructions to complete the electronic application process.

Client Name:

Client Email:

Your Name:

Your Email:

* Client Last 4 Digits of SSN/Government ID:

* Client Birth Date:

Subject: **Bob Jones - iSured Annuity Product - Send Email Request -**

Message: Dear [CLIENT_NAME],

Thank you for applying for 'iSured Annuity Product' of Training Site.

Use the link included at the bottom of the email to to start the signing

Please use your birth date and the last 4 digits of your SSN to login.

If you have any questions please feel free to contact me.

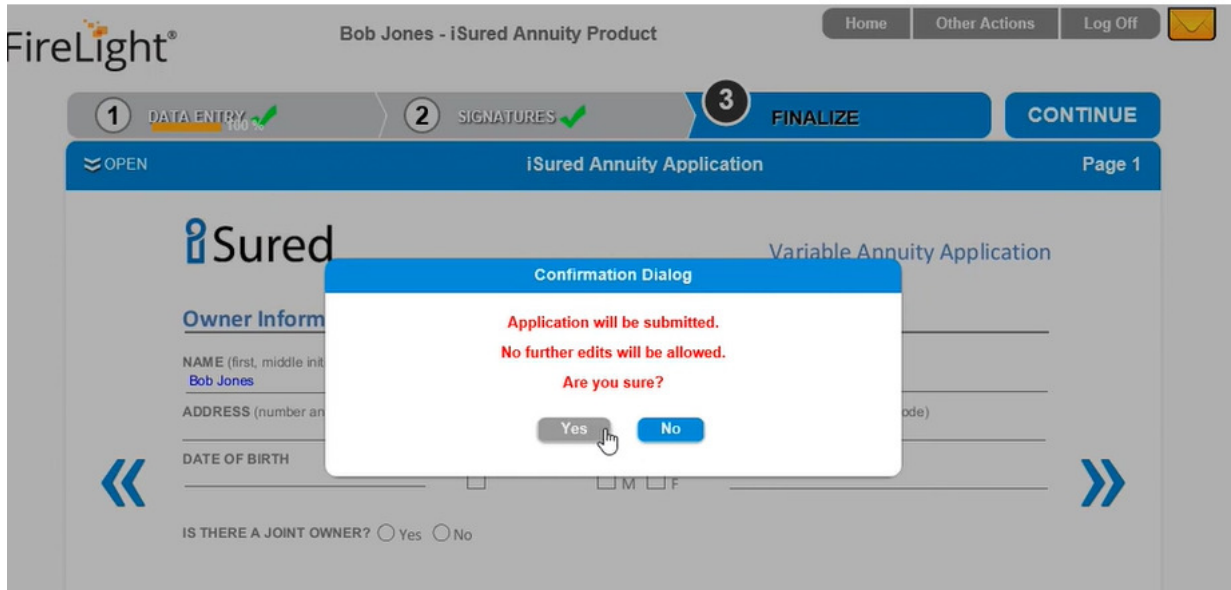
* These values will not show in email

CLICK the Send Email Request button

The screen will update to reflect the date and time the email was sent along with the unique URL.

Your client will receive an email with instructions on how to sign.

Once all signatures are obtained you are ready to Finalize. Click continue and YES and the application will be submitted to the carrier. NOTE: that a green check mark will appear next to Finalize and you will know that it was submitted to the carrier.




Once case is uploaded into our system a case manager here at Innovative will be assigned to your file and they will update you with status on the policy.

If at any time you are completing an application and have to stop in the middle of completing it just click the SAVE button and you can come back to the file at any time. You can find it on the right hand side of the screen which says Recent Activity and just reopen and continue from there.

SIGNATURE INSTRUCTIONS FOR THE CLIENT

Client will receive an email from fl-noreply@insurancetechnologies.com

Bob Jone - iSured Annuity Product - Please complete your signature

 Victoria Carter <fl-noreply@insurancetechnologies.com>
Today, 2:09 PM
You ↕

 Reply | v

Bob Jones,

Thank you for applying for 'iSured Annuity Product' of Training Site.

Use the link included at the bottom of the email to to start the signing process. You will be asked to acknowledge your acceptance of the disclosure terms and consents. The instruction for completing your 'Electronic Signature' will be provided as well.

Please use your birth date and the last 4 digits of your SSN to login.

If you have any questions please feel free to contact me.

Once in there will be a Welcome window where they put in the last four digits of their SS# and birth date

The 'Welcome' screen features a blue header with the word 'Welcome' in white. Below the header, there are two input fields: 'Last 4 Digits of SSN/Government ID:' and 'Birth Date (MM/DD/YYYY):'. A dark grey 'Enter' button is positioned below these fields. A horizontal line separates this section from the next, which is headed by the word 'OR'. Below 'OR' is a 'Passcode' input field and another dark grey 'Enter' button.

To begin the signature process click the Sign Activity button. Then check the box below that they have reviewed the application by arrowing through the pages.

I have reviewed and agree with the terms expressed within this document.

Two dark grey buttons are shown: 'Sign' with a blue hand icon pointing to a document, and 'Cancel' with a white arrow icon pointing left.

Then click the Sign button:

Provide the information to Capture the Electronic signature and check I Consent:

The 'Capture Electronic Signature' screen has a blue header with the text 'Capture Electronic Signature'. It contains several form fields: 'Signer Full Name:' with 'Bob Jones', 'City:' with 'Denver', 'State:' with a dropdown menu showing 'Colorado', and 'Today's Date:' with '5/10/2018'. Below these is a 'Select Font:' dropdown menu showing 'Over the Rainbow'. A red instruction reads 'Sign on this pad to override the text script'. Below this is a yellow signature pad displaying the handwritten text 'Bob Jones'. At the bottom are three buttons: 'I Consent' with a green checkmark, 'I Decline' with a red X, and 'Clear Signature' with a blue square icon.

Once completed the insured will receive the below message:

Congratulations, you have signed all the required document sets for this application.



The next step is the agent will receive an email to sign and then off to processing it goes.