

Remote Sales Requirements

The way we do business is rapidly changing due to the COVID-19 pandemic. While many agents prefer in person meetings to help build trusted relationships with clients, we understand that's not always a viable option.

Remote sales requirements

Ameritas Life Insurance Corp. has a proven remote sales process that offers flexibility for a variety of sales scenarios. You can complete a sale via phone or video and have clients sign all documentation using DocuSign. This preferred method for remote selling gives the client the best opportunity to review the application before signing, automatically delivers a complete and secure application packet after all signatures are obtained and protects the agent in the event of future disputes.

Additional options

We are temporarily offering additional ways for you to complete remote sales given our current environment.

Meet with a client via Skype, Zoom, Webex or other electronic meeting technology. Choose a technology that allows a screen share so you can review all the application documents with the client. Once the documents are reviewed use the Face to Face Signature option in the eApp and follow these steps:

- Give the client control of the screen so they can check the appropriate boxes to acknowledge they agree to the information.
- When completing the application, please tell us how you conducted the meeting in the producer statement portion of the application. Example: Meeting was done via Zoom.
- Print all application forms for your client. To protect your client's privacy either mail copies of all signed forms or email using a secure email service.

Ameritas reserves the right to no accept remote applications at any time.

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A few suggestions

- If you are conducting a remote meeting, ask permission to record it. This protects you and your client by keeping a record of the meeting.
- Completing the application via the telephone is a valid option. In this case, you must use DocuSign as the signing method.
- If you are emailing application paperwork and using DocuSign, we suggest having a virtual meeting, as it allows social interaction with your client. It also encourages your client to take immediate action and you will be able to assist them with the process of signing documents, if necessary. This ensures the application is completely signed by both you and the client before ending the meeting.

Ameritas will continue to work with you to better support you and your clients during these challenging times. Please let us know if you have questions or need assistance.

800-390-2361

