

HBW Brokerage Business Transmittal Form

AGENT'S INFORMATION: Name: _____ HBW Code #: _____ Address: _____ City: _____ State: _____ Zip: _____ Phone: _____ Fax: _____ Email Address: _____	Today's Date: _____ CLIENT'S INFORMATION: Carrier: _____ Client Name: _____ Date of Birth: _____
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UNDERWRITING

Was your client shopped through HBW Brokerage for Impaired Risk? [] Yes [] No

Other Attachments / Comments / Instructions Here:

ENCLOSED ARE:

- [] Client Application
- [] Carrier's Tentative Offer
- [] Certificate of No Sales Illustration (if illustration is not provided) **REQUIRED**
- [] Replacement Form (if replacing existing coverage)
- [] HIV (required if paramed exam is completed)
- [] Paramed Exam & Lab Ticket
Agents are responsible for arranging your client's paramed exam, excluding Chase Telelife, U.S. Financial, and Prudential Express)
- [] Paramed Exam on Another Carrier's Form
(Correspondence required stating why another carrier's forms are being submitted)
- [] Bank Draft Authorization Form (voided check required)
- [] Pre-Payment in the amount of \$ _____
NOTE: Premium may only be submitted with applications on cases rated "Standard" or better. If the determined risk classification is less than "Standard" (table rated) **DO NOT SUBMIT PREMIUM.**
- [] Limited Temporary Agreement

PROCESSING BROKERAGE BUSINESS

For questions pertaining to processing brokerage business (required forms, etc.) please contact Staci Batchelor staci@hbwinc.com

STATUS AFTER SUBMISSION

For Expedited Status Service:

Go to www.hbwinc.com. Under the "Forms" tab select "Status Request Forms," fill out completely and submit your request electronically.

LICENSING

ENCLOSED ARE:

- [] Appointment Application
- [] Assignment of Commission
- [] Agent or Broker Agreement
- [] Agent Information Form
- [] License Application
- [] Solicitor's Agreement
- [] Authorization to Obtain and Disclose Information
- [] Selling Agreement
- [] W-9 Tax Form
- [] Photocopy of Errors & Omissions Insurance
- [] Photocopy of Life License
- [] Pre-Appointment State (Contact HBW)
- [] Other _____

For information pertaining to Licensing, please contact license@hbwinc.com

Life Brokerage Business Processing Instructions

- If pre-appointment is required, the client application, paramedical exam and lab ticket should be submitted AFTER you are appointed/contracted with the carrier.
- For Life Brokerage appointments, fill out the [Appointment Request Form](#).
- [HBW New Brokerage Business Transmittal Form](#)

Application forms and form numbers. Obsolete forms are not accepted. State laws mandate that each application page MUST have a legible form number. Outdated or illegible forms will be returned.

Black ink is necessary in order to process your business. Blue ink is NOT visible when faxed and cannot be processed.

Illegible information. Please write CLEARLY and answer ALL questions on the application. Illegible application will be returned for revision.

Signatures and application dates. All signature dates MUST be within 30 calendar days and must be submitted to HBW within 25 calendar days or they are considered "expired". All signatures pages must have the same date. Corrections to signatures and dates require a newly completed form.

Paramedical exams. Paramedical exams. A paramedical exam MUST be attached to every sale unless underwriting requirements dictate that the client is not required to complete an exam. (**Please note:** USFL will order the paramed. Please do not submit a paramed with application.)

Cash with Application (CWA) Please read through the Temporary Insurance page attached to each new business application to ensure that your client qualifies. Checks **will not** be accepted for sub-standard (table rated) cases. If you're submitting cash with the policy **the check date must be the same as the application** and for the full premium amount due.

- If you're submitting cash with the policy **the check date must be the same as the application** and for the full premium amount due. PLEASE MAIL BOTH THE PREMIUM AND APPLICATION TO: **HBW 3355 COCHRAN ST. STE. 100 SIMI VALLEY, CA 93063 ATTN: LIFE BROKERAGE**
- **NO CASH WITH APPLICATION** - Please fax applications to: (888) 733-8210

Once your application is reviewed we will notify you of any changes or additional paperwork needed to complete the sale. If you have additional questions on how to submit your life brokerage business, please e-mail staci@hbwinc.com.