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# TAG's Paperwork in Good Order Success

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(PIGOS)

## What happens when you fax or scan TAG an app?

### Annuities

Applications will typically be reviewed within 4 hours to make sure all required information is included. Agents will be notified via phone or email whether or not changes need to be made. Your TAG case manager will let you know the next step, i.e. where to mail if necessary.

### Life Cases

For life cases, original paperwork is typically not required, so paperwork can be scanned or faxed to save time. When an application is submitted for review, the information will be input into our system. From there, Exams, Aps, etc., can be ordered and sent directly to the vendor. The application will be scanned for viewing, and the case will be noted for follow-ups. We will notify you of any changes in status.

## Double check this list before sending us your apps:

1. Scan or fax TAG your apps **before sending them to the Carrier**. It's "bank" for your bank!
2. **Scan or fax us all the pages**, not just the signature pages.
3. Be sure you're **appointed** and have **completed all product specific training** before taking an app.
4. **Use our online contracting** to make your appointments a breeze. <https://goo.gl/oO9bSD>
5. Make it obvious what is being sold with a **signed illustration submitted**.
6. There are often extenuating circumstances - **please include a cover note!**

## How does this process benefit you?

1. Following our PIGOS process by sending to TAG first, makes for faster issue, greater agent and client satisfaction.
2. We can help you catch errors ahead of time to make for quicker issuance.
3. Our process reduces the amount of time the original paperwork is in the mail.
4. As always, if we receive original paperwork via mail at our office, it will be reviewed and forwarded to the appropriate company for processing. However, emailing and faxing apps is advised for speed and less re-work. If there is a check attached to the app being submitted, please mail the check to our office separately but still send us the app via email or fax so that the application can be entered into our system, exams can be ordered and the app reviewed for missing information and ready to go by the time the check is received at our office.

*From written to paid, our mission is to serve you.*

Agent Use Only – Not for Public Use