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# Paperwork in Good Order Success

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(PIGOS)

## What happens when you send TAG an app?

Applications will typically be reviewed within 3 hours to make sure all required information is included, and agents will be notified via phone or email whether or not changes need to be made.

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.

## Life Cases

For life cases, original paperwork is typically not required, so paperwork can be scanned or faxed to save time. An exception to this rule is the 1035 Assignment form, as a few smaller carriers still require the original.

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

1. Send TAG your apps **before sending them to the Carrier**. It's "bank" for your bank!
2. **Send us all the pages**, not just the signature pages, if no money is being submitted.
3. Be sure you're **appointed** and have **completed all product specific training** before sending 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**.
6. There are often extenuating circumstances - please **include a cover note!**

## How does this process benefit you?

1. Agents can submit applications to companies directly and still receive follow-ups from TAG.
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 paper mail at our office, it will be reviewed and forwarded to the appropriate company for processing. However, faxing or emailing your paperwork, as noted above, is advised for speed and less re-work.

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