

# Preparing for your Accelerated Underwriting call



SBLI is pleased to offer our accelerated underwriting applicants the most convenient way to complete their SBLI life insurance applications—a 20-30 minute phone call with an experienced customer service professional.

## Essential Call Information



### Please have the following information ready:

- ✓ Your **driver's license** and, if applicable, other form of government-issued identification (example: permanent resident cards, visa, etc.).
- ✓ Names, addresses, and phone numbers of **doctors and clinics you visited in the past five years**.
- ✓ The names and dosages of **any prescription or over-the-counter medications** you take.
- ✓ A **list of medical conditions** or diagnoses, including date of diagnosis, treatment, result of treatment, and treating physician information.
- ✓ **Payment information** to activate your policy. SBLI accepts Visa or MasterCard for initial premium, or you can provide your bank routing and account numbers for our Electronic Funds Transfer program. Regardless of your payment method, please note that **your first premium will be drafted within 24 hours of your policy being approved**.

## Two Great Services

During the call, you'll be asked if you're interested in two services:

**E-delivery:** If available through your agency, you may have the option to elect to have important documents, including your policy, sent to you electronically upon approval of your application.

**LegacyShield:** You can elect to share your contact information with our trusted partner LegacyShield<sup>1</sup> to get your complimentary subscription<sup>2</sup> to Shield, a secure cloud-based storage and notification tool.

**Thank you for choosing SBLI. Rest assured all personal information you provide will remain strictly confidential. Please contact your agent with any questions.**

<sup>1</sup>LegacyShield is an independent, cloud-based document storage service provider. Your relationship or agreements with LegacyShield are separate from your relationship or agreements with SBLI. <sup>2</sup>SBLI will provide no less than one full year of FinancialView and Shield, the basic-level subscription to LegacyShield. Contact LegacyShield for additional terms and conditions. The Savings Bank Mutual Life Insurance Company of Massachusetts, Woburn, MA. Approved for consumer use. Products and features may not be available in all states. ©2018 All rights reserved. NAIC #70435. 18-4060 4/18