

As a life insurer, your success depends on fast, efficient delivery of information. Waiting on paper signatures puts your revenue and your customer service reputation at risk. Join more than six hundred insurance companies including 11 of the top 15 largest insurers and automate document flow and signature collection with DocuSign.

The SBLI logo consists of the letters "SBLI" in a bold, blue, serif font, with a registered trademark symbol (®) to the upper right.

"We use DocuSign for over 85% of our life insurance business. DocuSign has brought our business to a whole new level."

### **Grow Revenue by Getting Policies Signed Faster**

The time it takes applicants to complete underwriting documents using ink and paper puts you at risk of customer defection, especially if your competitors can complete the process faster. With DocuSign, applicants complete and sign documents in minutes, and without errors, so your cycle time comes down dramatically with less chance that clients take their business elsewhere. Your staff can spend less time tracking down signatures and trailing documents, and more time focusing on sales.

### **Reduce Costs for Staff Time, Shipping, and Paper**

DocuSign saves you significant staff time because documents get sent for signature instantly along with automated reminders so clients finish the signing process faster. If your clients need to update account information, such as a change of beneficiary form, the system captures all required instructions. Plus, you — and your brokers and agents — can cut costs for paper, ink, faxing, couriers and overnight shipping dramatically.

### **Eliminate Incomplete Forms**

DocuSign goes beyond simply collecting an electronic signature. Documents, data and signatures go straight into your back-end systems, eliminating scanning or manual re-keying, and incomplete forms are sent back to the signer, so every form is 100% complete. Data fields can be collected, captured and verified at the point of signature, and loaded directly into your system for downstream use.

### **Embrace the Cloud**

Life carriers large and small are modernizing aging infrastructure, and standardizing with industry-leader DocuSign. DocuSign delivers the speed, security and scalability necessary for carriers to take the strategic step of embracing the cloud.

### **Delight Your Clients and Agents**

DocuSign is accessible on all devices, including PCs, smartphones and tablets. It supports iOS, Android, and Windows mobile devices. Clients get a faster, more convenient and easier way to interact with you and your agents, no matter where they are. You and your agents will have more satisfied clients, more referrals, and more time to focus on building the business.



## Gain Real-Time Visibility & Control

With DocuSign's workflow management tools, you can track the status of documents in real time. You'll always know where agreements are in the process, who has signed them, and who hasn't. It saves you costly follow-up when trailing documents are missing and provides you better forecasting ability and more efficient resource allocation.



## Improve Document Security

DocuSign offers an enterprise-class network with a track record of 99.99% system availability proven to be safe, reliable and secure. It has the highest level of security certification, ISO, SSAE16, and PCI compliance, and TRUSTe certification. DocuSign's fully redundant SSAE 16 certified data centers, network, policies, and procedures have passed 100% of security audits with the largest insurance and financial services institutions, making DocuSign safer and more secure than pen and paper.

## Accepted by Downstream Partners

Electronic signatures have been legally accepted for over a decade, but to work in your business, they also need to be accepted by your downstream partners, such as state government agencies. DocuSign has also partnered with providers such as iPipeline to ensure the platform meets their needs as well.

## Insurance Agent & Broker Use Cases

With DocuSign you can automate a wide variety of processes, including:

- New policy applications
- Part 1 forms
- Trailing documents
- Premium payments
- Account change forms
- Change of address forms
- Change of beneficiary forms
- Contracts
- Purchase orders
- New employee paperwork
- Expense reporting
- Non-disclosure agreements
- IT asset tracking

## Sample Customers



## For more information

Contact your account executive to learn more about how DocuSign can help improve the experience for your clients, brokers, and agents.

### About DocuSign

DocuSign® is the Global Standard for Digital Transaction Management®. DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud.

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