

# Symetra SwiftTerm<sup>SM</sup> Agent Case Study

*Digital Process with 5 Easy Steps*



## AGENT ACCOUNT OF THE PROCESS

- Ben completed the agent portion on Monday and an email was sent to his client
- Client completed his portion of the application on Monday afternoon
- Ben received an email immediately stating the case was pushed to 1-3 day turnaround option
- Ben received an email Friday afternoon stating the policy was approved as applied for
- Client received email of approval and to accept and pay for the policy
- Client accepted and paid on Saturday morning and the policy was in-force

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## AGENT CONCERN

Ben is a busy insurance agent concerned with turning around insurance offers before clients lose interest.

## SOLUTIONS

Using Symetra's Swift Term product enables Ben to save time with no in person meeting or medical tests. The entire process is digital. The client can have coverage in place within 1 to 5 days of submitting an application. Symetra emails Ben immediately with updates during the application process.

## 5 EASY STEPS TO COVERAGE

1

### Drop the Ticket

Producer, Ben completes the digital drop ticket in minutes

2

### Complete e-Application

Application is automatically emailed to the client for completion

3

### Electronically Sign

Client signs the application using e-signature

4

### Decision Made

Symetra's decision is made and delivered to the client in as little as 25 minutes

5

### Electronically Pay

An electronic payment completes the process and coverage begins