

Presents

# Underwriting



# Agenda:

- **Underwriting Goal**
- **Underwriting Guide**
- **Underwriting Support**



## Underwriting goals

– Our goal is to:

- Act on all new applications and additional mail within 48 hours
- Work closely with New Business to meet defined SLAs for non-medically and medically underwritten business



## Underwriting Guides

### - Underwriting Guide

- Can be found on Foresters Financial™ producer website and it:
  - Helps determine if an application should be submitted as non-medical or medically underwritten
  - Outlines Preferred criteria
  - Provides a list of what medications would result in an automatic decline
  - Lists who our vendors are
  - Provides guidance around some benefits and riders

### - Quick Tip

- Providing complete information to all “Yes” answers ensures smooth and speedy processing

## Support is just a call away

- **Foresters Risk Assessment Team**
  - **Assistance with:**
    - **Assessment of medical information for potential underwriting offers**
    - **Available to discuss medical cases for all products except PlanRight**
  - **Phone: 866-466-7166, option 2**
  - **Hours: Monday-Friday 9:00am-7:30pm ET**

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NEED  
TO  
KNOW?



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# Thank you!

Any questions?



Our Foresters Financial Sales Support team is only a call away, 866-466-7166, option 1 Monday-Friday 8:30-7p.m. ET.

If you're looking for a deeper dive on a particular module or additional training needs please let us know at [USLearning@foresters.com](mailto:USLearning@foresters.com)