

NEW BUSINESS/UNDERWRITING

General Areas of Responsibility

Contact Person & Title

Underwriting and Eligibility
Management of Underwriting Process

Diane Gill
Director, Insurance Services

New Business Mail Processing
Original File Set-Up
Underwriting Requirements Ordering
Requirements Follow-Up
Manage Pending Status Report
Process Life Insurance and Annuity Applications
Certificate Generation
Handle Non-Placed Certificates/Cancelled
Applications
Commissions Processing
Production Credit Maintenance
Monthly Reporting
Reinsurance Processing
Term Conversions
Face Amount Increases on UL's
Chronic Illness Accelerated Benefit Rider Additions
Reinstatements

Christian Laland
Team Leader, New Business

Dave Glennen
New Business Representative

Diane Gabbert
New Business Representative

CUSTOMER SERVICE

General Areas of Responsibility

Contact Person & Title

Management of Customer Service and Claims

Diane Gill
Director, Insurance Services

General Policy Information (cash value, plan type, etc.)

Cash Surrenders/Cancellations

Name/Beneficiary Changes

Loans/Partial Withdrawals

1035 Exchanges/IRA Transfers

Dividend Option Changes/Surrenders

Assignments

Reduced Paid-Up and Extended Term

Lapses on Traditional Life and UL

GPO

Excess Contributions on IRA's

Policy Changes

Term Renewals, Terminations

Extended Term Expirys

Viking 21, 23 at Renewal

Special Billings

Required Minimum Distributions on IRA's

Imaging of all new files, updates, and general clerical duties within Insurance Services

Address Changes for Insurance Members

Return Mail Processing

Faye Gibson

Customer Service Representative

Camelia Sabeti-Oseid

Customer Service Representative

Death Claims on Insurance Members

Health Claims

Disability Claims

Premium Deposits

Termination of Disability, Waiver and

Accidental Death Benefits

Tax Reporting Questions

Scheduled Loans

Endowments

Supplementary Contracts/SPIAs, Including Payouts

Georgia Wilson

Team Leader, Customer Service
Senior Claims Examiner

ACCOUNTING

Lodge Deposit Fund

Kristi Olinger
Accounting

SALES and COMPLIANCE

Computer

General Illustrations

E-Apps

Re-Proposals

Technical Related Questions

Mark Hellickson

National Sales Manager

Vicki Sivula

Compliance Analyst