

Email Report Sent to Sons of Norway Insurance Professionals

EXAMPLE EMAIL EXPLAINED:

Applicant: person applying for policy

Prem Rcv'd: amount of premium received

Ent: date entered in system

Dy: # of days the certificate has been pending

Cert/Plan: certificate number applied to policy and plan type

App Dt: month/year of application

Final..: Code for underwriting decision (see key below)

Birthdate: Insured's birthdate

Annuity: Face amount being applied for

App Approved Dt: Date of approval

Signed-Illus-YN:

Dth-Ben: Face amount being applied for

Cert Mailed Dt.: Date mailed to Sons of Norway Insurance Professional

Y: yes. Signed illustration received

N: No. Signed illustration is needed

This section shows Underwriting requirements and who orders what (see Key A & B below)

In this section you will find the additional information required during the underwriting process:

APS Doctor: APS ordered

APP Remark: Rating- if rating given

APP Remark: Waiting on requests or info from Sons of Norway Insurance Professional

Deliver Reqmt: In this section you will find requirements are needed for delivery and placement of certificate

- Amendment
- Signed Illustration
- Membership Application and/or Dues
- Delivery Receipt (ALWAYS)
- DUE: Date the requirements are due back to the Home Office

Final:

S: Annuity, juvenile, tobacco

P: Standard

X: Select

Z: Super-select

R: Rated

D: Declined

C: Cancelled

KEY A

Requirements ordered by the Insurance Professional:

- Examination
- Blood Profile
- HomeOfcSpcmn
- Bld&BloodPrs
- EKG

KEY B

Requirements ordered by NBR

- Inspection report
- Motor vehicle reports
- PHI
- Scriptcheck