



The virtual way to sell life insurance with ivari

Contact-free...and easy as can be!

We've designed a contact-free process that allows you to continue selling life insurance while keeping both you and your clients safe during this time. That means you can keep growing your business while keeping your distance.



Step 1: Meet with client virtually to complete the application

- Your client can sign the completed application using an eSignature
- Then you submit the application electronically to *ivari*

Pro tips!

Check out these pro tips so you're ready-to-go with contact-free applications:

[Completing the application – data gathering and attaching a document](#)

[Signing the application with a client's eSignature](#)



Step 2: Manage new business in webcappow

In webcappow...

- You'll be notified by *ivari* about any outstanding requirements on the eNotifications page
- You can respond directly to underwriting requirements and also view eApp documents, underwriting activity, delivery requirements and new business letters

Pro tips!

Learn all about our underwriting process and become a webcappow pro in no time!

[Our underwriting process](#)

[An overview of webcappow](#)

[Find your business at a glance with webcappow](#)

[Manage your new business with webcappow](#)

[Find underwriting requirements in webcappow](#)

[Use webcappow to respond to underwriting requirements](#)

Step 3: eDelivery of policy contract to client

When a policy contract is ready to be downloaded, you will be notified via your regular daily consolidated eNotification. Then you simply follow these steps:

- Review the policy contract and then release it to your client via webcappow
- Have your client review and sign the policy contract online
- You review the signed contract and return the delivery requirements to *ivari* via webcappow
- We review delivery requirements and, once satisfactory, settle the policy



Pro tips!

Get access to the full eDelivery process here:

[The eDelivery process](#)

Keep in mind:

- To ensure client and data privacy, you must not store/keep copies of any client identification documents that would have been used to complete the application.
- For UL policies only – *ivari* will verify the client's identity through Equifax. This process will not affect the client's credit history and additional consent is not required. A notification will not be sent upon verification.
- It is your responsibility to ensure that the policy owner(s) downloads and saves the policy contract to accept delivery.