

Electronic Policy Delivery Getting Started Guide

Protective Life's EPD option allows you to deliver your clients' policies by secure email link—helping them protect their tomorrows wherever they are today. EPD is available when:

- Life insurance policies with only one insured
- The policy owner and insured are the same person
- The resident state is not New York
- The agent has an active appointment with Protective Life
- We have a valid email address for you, your agent, and the client

How it works:



Once underwriting is complete and the policy is approved and issued, your agent will receive an e-mail from Protective Life containing the link to a secure site to access the life insurance policy contract. Ask the agent to add epdagent@protective.com to their e-mail address book to ensure our e-mails are received.

Upon the agents release, the client will receive an email from epdcustomer@protective.com including a link to the secure site where they can access their life insurance policy and related information.



After following the online registration instructions, the client will be asked to review and electronically sign any applicable policy documents.



If needed, the client will also have the ability to make their first premium payment online.



The client will need to complete the electronic delivery process within 10 business days, or the policy will revert to paper delivery and will be mailed to your office.

Tracking your electronic policy deliveries

Agents can track the status of their electronic policy deliveries by selecting the “My Electronic Policies” link under the “My Business” option on MyProtective.com. Once the policy is placed in force, a copy of the policy and delivery requirements will be available for you to review or download for 45 days.

Tips for Success

- Add epdagent@protective.com to your email address book to ensure you receive EPD notifications
- Tell your clients what to expect from the EPD process and provide them with a copy of the available Understanding Electronic Policy Delivery flyer.



Eliminate the hassle of paper policy delivery with EPD. **Get started today.**
Questions? Contact our sales desk at 800.628.6390, option 2 for additional information or assistance.