









Save time with e-policy delivery

Discover a faster and more efficient way to move your life business with our optional electronic policy delivery process. This is a new digital solution that bypasses the physical delivery of a policy, allowing you to:

- Quickly return your client's policy, enabling your client to electronically sign and return the required trailing documents such as the policy delivery receipt
- Deliver your client's policy without scheduling an in-person meeting
- Retain digital copies for your records and save on postage spent from sending multiple copies

Here's how it works

-  Nationwide[®] requires an Electronic Document Delivery Agreement (EDDA) to be signed by the policyowner prior to the contract being delivered
-  The policy is uploaded to DocuSign for e-delivery
-  The policy is emailed to the financial professional
-  The financial professional reviews the policy; if changes are needed, the policy is sent back to Nationwide, then returned to the financial professional for a final review
-  The financial professional approves or declines the policy
-  A DocuSign envelope is routed to the policyowner when approved
-  The policyowner reviews and signs any required trailing documents electronically
-  All parties receive copies that can be downloaded or printed

Availability

Available in all states except New York

States	Requirements	Products
California	EDDA and a California-specific Opt-In Disclosure (included in the same envelope)	Nationwide YourLife® Guaranteed Level Term Nationwide YourLife® 20-Pay Whole Life Nationwide YourLife® Simplified Whole Life Nationwide® Indexed Universal Life Accumulator II Nationwide® Indexed Universal Life Protector II Nationwide® No-Lapse Guarantee Universal Life II Nationwide CareMatters® II
All other states	EDDA	Nationwide New Heights® Indexed Universal Life Accumulator Nationwide® Survivorship Indexed Universal Life

Things to consider

- Nationwide will use DocuSign to electronically deliver the policy contract, which allows for the client to sign any trailing documents electronically utilizing the provided email addresses for all parties involved
- Depending on outstanding delivery requirements, there may be multiple envelopes delivered through DocuSign, requiring an access code; the code is the last four digits of the client's Social Security number
- At each step along the way, there is the option to print, save or decline the DocuSign envelope



For more information, please contact your Nationwide representative.



• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution • Not insured by any federal government agency • May lose value

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