



Security National
Life Insurance Company

TELESALES WITH APPTICAL PARTNERSHIP
Simple Security Plan

Effective April 17, 2020

SIMPLE SECURITY PLAN TELESALES WITH APPTICAL

In an effort to enhance our telesales process and experience, Security National Life has solidified a partnership with the industry leader for point of sale interviews. Security National Life has partnered with Apptical who brings over 30 years of experience and an integrated suite of underwriting automations to improve the agent experience in the telesales process. With Apptical's expanded hours and dedication to service, we hope to improve the convenience of our telesales process for all agents across the nation.

STEP 1: MEET WITH THE INSURED THROUGH PHONE OR VIDEO CALL

The image shows a sample of the 'SIMPLE SECURITY PLAN' application form. The form is titled 'SIMPLE SECURITY PLAN' and is issued by 'SECURITY NATIONAL LIFE INSURANCE COMPANY'. It includes fields for the insured's name, address, date of birth, and social security number. There are also sections for the policy, including the policy number, premium amount, and payment frequency. The form also includes a section for the beneficiary, with fields for the beneficiary's name, address, and date of birth. The form is a standard application form for a life insurance policy.

It is best practice to prepare for the Apptical Interview by completing a paper application for Security National's Simple Security Plan. This will ensure a smooth transfer of information to the Apptical representative.

In addition to the paper application, please see our document entitled, "Telesales Script and Tips" for a guide on how to make a sale over the phone. This document can be downloaded from www.SecurityNationalLife.com/fetraining.

STEP 2: CONTACT APPTICAL TO COMPLETE POINT-OF-SALE INTERVIEW



Notice! Apptical's services are available for in-person appointments as well. Please observe proper social distancing practices where applicable.

Apptical Service Hours:

Monday through Friday: 8:30 AM to 2:00 AM ET
Saturday and Sunday: 10:00 AM to 10:00 PM ET

Closed: New Years Day, Easter Sunday, Memorial Day, 4th of July, Labor Day, Thanksgiving Day, and Christmas Day

With the insured on the line, please call 800-737-6972. For English assistance, please press 1. For Spanish assistance, please press 7.

Apptical Interview:

If this is your first time using Apptical's services, you will need to provide your name, telephone, and SNL agent number to register before moving forward. Additionally, you will need the following information to proceed:

1. Insurance Company name (Security National Life)
2. Product Name (Simple Security Plan)
3. State the policy is being sold in
4. Security National Agent Number

The Apptical interviewer will be collecting all the information necessary to complete the Simple Security Plan application. In order to expedite this process, **please have the application information ready before the Apptical interview begins.** The insured must be prepared to answer questions to verify their identity as well as give verbal authorization to complete the application process.

FINAL STEP: APPLICATION PROCESSING



At the completion of the interview, you will be provided a 7 digit reference number by the Apptical representative that will be used to identify the application with both Apptical and Security National Life.

After verbal verification and authorizations have been completed, the Apptical representative will provide a point-of-sale decision based upon the medical conditions and medications provided on the application.

Apptical will provide the completed application to Security National for processing and activation.

Do you have a question?

We are committed to ensuring a smooth telesales process. If you are in need of assistance, please contact your local manager or call our agent hotline: 800-SNL-4SNL, then press 4.

