

Sales Checklist for Liberty Series Estate Maximizer Next Generation

1. Call Imeriti, Inc. to obtain application or go to "Get Forms" on the website.
2. Complete Application with the proposed insured answering "NO" to questions 9a-9e. If the proposed insured answered "YES" to any question in 9a-9e, contact Imeriti at **800.921.3100** to determine suitability for the proposed insured.
3. Fax the completed application and signature page to **1.800.400.6694**.
4. Within 10 minutes, a Liberty Life representative will call you to let you know if the policy qualifies for instant approval.
If you do not receive a call from Liberty Life within 15 minutes, call **1.800.897.9883.*
5. Overnight the **original application** and **premium** to Liberty Life:

Liberty Life Assurance Company of Boston
Attn: Fila Department
100 Liberty Way
Dover, NH 03820
6. If you are notified that the policy needs to go to full underwriting, please contact Imeriti for Instructions.
7. Once application and premium are received at Liberty Life, you will receive the policy within 48 hours.
8. Deliver the policy to the insured.