

AXA drop ticket

frequently asked questions

What is Drop Ticket?

Drop Ticket is an application submission process. Financial Professionals collect a minimal amount of client information, and an approved vendor, CRL Plus (formerly Hooper Holmes), completes the application by phone.

What are the benefits?

- Financial Professional efforts regarding data collection are minimized.
- The need for Financial Professionals to schedule paramedical exams is eliminated.
- There will be an increase in the volume of in good order applications and placement ratios.
- Cycle times will be reduced.

How do I access Drop Ticket?

- Advisors: Within e-Forms for Life via axa-equitable.com
- Third-Party: Directly from iPipeline iGO, for subscribers

Is this available through all distribution channels?

Yes.

What products can be submitted through the Drop Ticket process?

All term life insurance products, except TermOne.

Can applications that involve replacements be processed through Drop Ticket?

- Term-to-term replacements are available.
- Permanent-to-term replacements are not currently available.

Are there any limitations if there is AXA coverage already in force?

No limitations; normal guidelines apply.

Is this available in all jurisdictions, including Puerto Rico?

There are no unique or new restrictions by jurisdiction.

Are there any special requirements or considers for NY (e.g. Reg 60)?

No. Continue to follow current NY state specific processes.

Can more than one Financial Professional be on the case?

Yes. This option is available and can be provided up front when completing the Drop Ticket.

Will this work when the owner is different than the Insured?

Yes. The process allows for these situations.

Will existing riders be available (e.g. Children's Term Rider, Disability Premium Waiver)?

Yes. The process can accommodate existing riders.

Can payments with the application be accepted?

Payment with application is not currently available.

Is Temporary Insurance available?

Temporary Insurance will not be available until payments can be accepted with the application.

Who will contact the client to complete the application?

Our fulfillment center (CRL Plus) will handle this via a telephone interview.

Is there a document for the client to understand how the process works?

Yes. What Happens Next is a client flyer outlining what they can expect after a Drop Ticket is submitted.

Is there a timeframe for how long the Drop Ticket will remain active?

Yes. It will expire after 30 calendar days from the date the Drop Ticket was submitted. It is critical for the interview to be conducted within that timeframe.

Who handles the exam? Can I use my current exam company and set it up myself?

The fulfillment center at CRL Plus will order all exams. Using other vendors will create delays and is not supported via Drop Ticket.

Are there any situations that may require CRL Plus to contact the FP?

- Client changes his or her mind and no longer wants to pursue the application.
- CRL Plus is unable to schedule the client interview within 30 calendar days.
- Client requests a change to critical information (e.g. Product, Face Amount, Riders, etc.).

Is electronic signature available?

Yes. Both the Drop Ticket and the application are completed, signed, and submitted electronically.

How will the Financial Professional be notified of the status?

- By email when the Drop Ticket is submitted.
- By email when the fulfillment center at CRL Plus completes the interview and sends the application to the client to be electronically signed.
- By email when the case is fully completed, electronically signed, and submitted to AXA.
- On the website with all other New Business, once the case is submitted to AXA.

Will the Financial Professional have access to the fully completed application?

Yes. When the case is completed and sent to AXA for processing, the Financial Professional will receive an email with a link to access the fully completed application and paperwork.

Will these cases qualify for EasyUnderwriting?

EasyUnderwriting cases should not be submitted via Drop Ticket. Once EasyUnderwriting is fully rolled out, it will be integrated into this process.

Is EasyUnderwriting different from Drop Ticket?

Yes. See the Financial Professional marketing flyer entitled: Drop Ticket vs. EasyUnderwriting. It outlines the features and benefits of both.

What if the client is not comfortable using the electronic signature process?

Electronic signature is required for the Drop Ticket process. If the client is not comfortable using electronic signature, the full application process should be used. If the client makes this decision after the Drop Ticket process has begun, CRL Plus will mail the completed application to the Financial Professional, and the Financial Professional will be required to obtain the wet signatures and submit to AXA for processing.

Is Life Straight Through Processing (STP) available for Drop Ticket?

- Life STP from Aegis to e-Forms for Life is supported by the Drop Ticket process for all users.
- Life STP from Salesforce.com to Aegis to e-Forms for Life is supported by the Drop Ticket process for current retail Salesforce.com users only.

Who do I contact for more information?

- Third Party Pre-sale: Call the Life Sales Desk at (800) 924-6669
- Advisors Pre-sale: Call the Life Sales Desk at (800) 289-1101
- Email: E-Forms_For_Life_Feedback@axa.us.com
- To schedule the phone interview: (800) 474-8147
- Status on submitted ticket: adminservices@crl-plus.com
- eSignature questions: esignature@crl-plus.com

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