



USER GUIDE: QUICK QUOTE

A FASTER WAY TO PROVIDE YOUR CLIENTS WITH A FINAL EXPENSE QUOTE

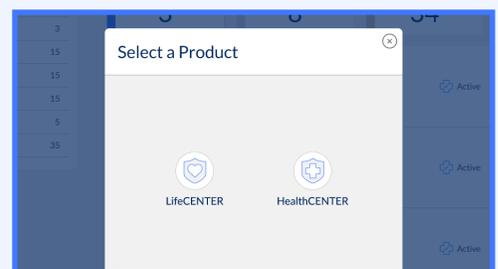
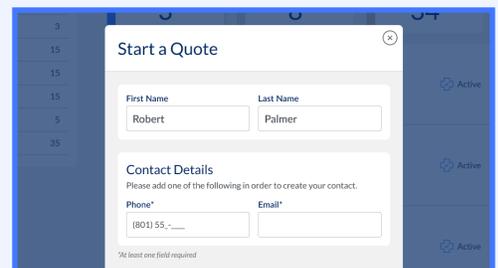
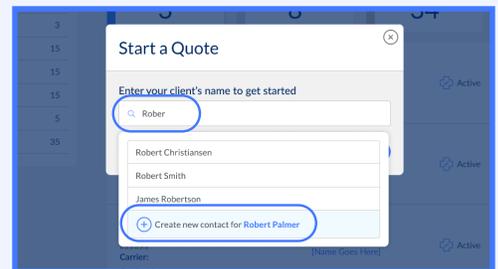
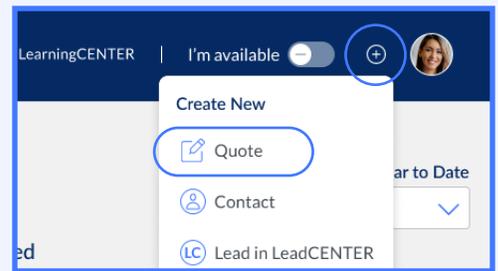
What Is Quick Quote?

Available in LifeCENTER, the Quick Quote feature allows you to rapidly generate a life quote from any page within the platform by inputting minimum details. It allows you to work faster while providing your clients with the key information they need to make decisions.

How to Create a Quick Quote

1. Log in to LifeCENTER.
2. In the navigation menu, click “+” and then select Quick Quote.
3. In the Start a Quote window, search for your client’s name, then select it.
If your client does not yet have a profile created in LifeCENTER:
 - a. Enter your client’s full name and click “Create a new contact for [Client Name]” at the bottom of the search menu.
 - b. Enter the required information in the popup window (First Name, Last Name, phone number and/or email address).
4. In the Select a Product popup window, click LifeCENTER to create a Life quote.

NOTE: If you only sell one product category, such as Life, you can click “Don’t show this again” after making your selection and the platform will always default to the category you chose. You can adjust this again later via your account settings.



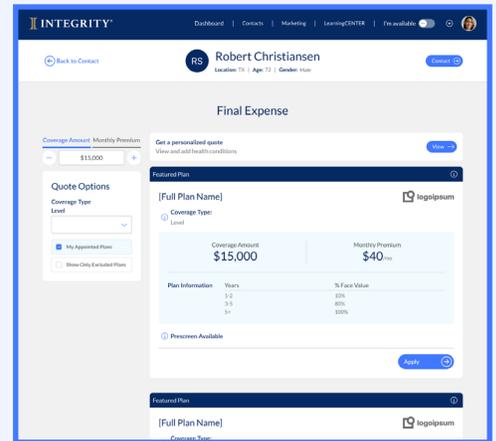
5. Choose a product from the provided options:
Final Expense, Indexed Universal Life or Term.

NOTE: At any point, if you need to correct your input in a previous window, click on the up arrow (T) to scroll back.

6. Fill in the requested details and click Continue.
Required info includes:

- a. State
- b. Gender
- c. Date of Birth
- d. Tobacco Use

7. Review the provided quote options. If your client is ready to proceed, you can click “Apply for Life policies” to begin the process.



Log in to start a Quick Quote today!

Life **||** CENTER

