

How to submit an Ancillary E-Application through the Self-Serve Portal (no agent assistance):

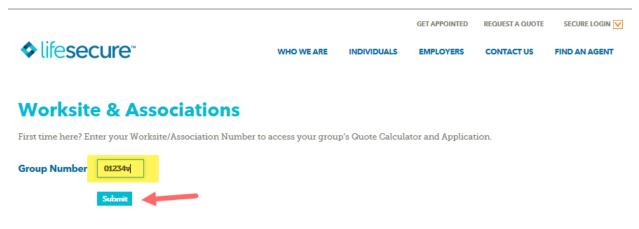
Please read the Application Tips that begin on page 13 prior to starting the application.

STEP 1. Go to the LifeSecure Insurance Company website at <u>www.YourLifeSecure.com</u>. In the upper right-hand corner hover over the Secure Login to populate the drop-down menu.

Click on Worksite & Associations



STEP 2. In the 'Group Number' box enter the group number provided by your Employer or your Agent in the Group Number box. Click **Submit**.



STEP 3. The portal page defaults to the Ancillary Products - Quote Calculator. On this page choose to run a quote prior to applying for the Insurance or go directly to the E-Application to apply for the Insurance.

- > To use the Quote Calculator prior to applying continue to **STEP 4**.
- To go directly to the E-Application go to STEP 8.



TO RUN A QUOTE PRIOR TO APPLYING:

STEP 4. Using the Quote Calculator, complete the information on the Home tab. The employer's name and group numbers prepopulated. Complete all information under the 'General Information' and 'Products' section. Click **Continue.**

E-APPLICATION QUOTE CALCULATOR		
Ancillary Products		
Ancillary Products - Quote	Calculator	
Home Coverage Results		
General Information		
Group Name		
Employer Name and Group Number pre	-populated here	
Where will the application be signed? Michigan +		
First Name	Løst Nøme	
Valued	Client	
Birthdøte Gender	1	
03/15/1985 Female \$		
Products		
V Accident		
Critical Illness		
Used nicotine within last 12 months?		
 Yes No ✓ Hospital Recovery 		
Height	Weight	1
5 7	145	
Feet Inches	Lbs.	L L
		Reset Continue



STEP 5. Complete the 'Coverage Tab' with the people that will be covered for each product chosen. Click **Continue**.

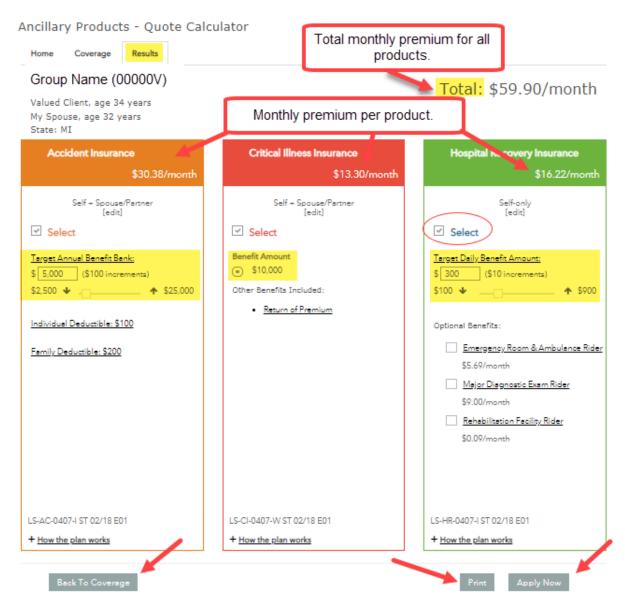
NOTE: If you choose other than Self-Only, a section for the Spouse/Partner Information will appear at the bottom. Complete the spouse information. Click **Continue.**

Home Coverage Results				
Accident				
Self-only				
Self + Spouse/Partner				
Self + Child(ren)				
 Self + Spouse/Partner + Child(ren) 				
Critical Illness				
Self-only				
 Self + Spouse/Partner 				
Dependent Children are automatically covered at no	additional charge.			
Hospital Recovery				
Self-only				
Self + Spouse/Partner				
Self + Child(ren)				
() Self + Spouse/Partner + Child(ren)				
Spouse/Partner Information				
First Name	Last Name			
Valued	Spouse			
Birthdate Gender	Height		Weight	
02/05/1985 Male V	5	5	120	
	Feet	Inches	Lbs.	
Back To Home			Reset	Continue



STEP 6. On the results tab adjust the desired benefits for each chosen product with the sliding scale or input the desired amount within the benefit bank box. The monthly premium will populate at the top of the quote box for each product. The Total is calculated and reflected at the top right of the quote.

NOTE: From this page you can click the **Home** tab to edit quote information, click 'Print' to print the quote and save the quote as a PDF to your computer, and/or click **'Apply Now'** to go into the E-Application (see STEP 7). These options are at the bottom of the page. You can also choose to remove a specific product on the Results tab by unclicking the **Select** box.





STEP 7. From the Quote Calculator after clicking Apply Now, the display prompts you to enter your phone number and email address. Click **Apply Now** to continue.

Phone Number		Er	nail	
Cancel	Apply Now			

Continue through the application. Some information will be prepopulated into the application from information previously entered in the Quote Calculator. Follow the steps below for guidance through to application submission.

TO GO DIRECTLY TO THE E-APPLICATION without running a quote first:

STEP 8. Hover over the E-Application tab click **Application**.





STEP 9. Complete the initial application section beginning with the appropriate state and product(s). Click **Next**.

ation > Application	
Application Submission State	
Please select the state in which you are completing The applicant must be physically present in that st	
The applicant must be physically present in that st	tate when signing the application.
	Michigan (MI)
*Residents of Massachusetts and New York: regardless of where the application is being compl	LifeSecure is not able to accept applications from residents of the states of Massachusetts or New York, leted and signed.
Product Selection	
Please select the product(s) for this application:	✓ Accident
Please select the product(s) for this application:	✓ Accident ✓ Critical Illness

After entering your Social Security Number and date of birth, a section to create your User Name and Password will populate at the bottom of the page. Follow the instructions to create your personal User Name and Password, Confirm Password. Choose a Security question and type in the Security Answer. Click **Next**. A saved application will remain in the system for 60 calendar days before it is purged.

lave you ever applied for a Life	eSecure policy?	© Yes ⊛ No	
Please Enter your Social Sec dentification Number:	curity Number or Other	<u>222</u> - <u>22</u> - <u>2221</u>	
Please Enter your Date of Birth			
after your policy is approve Worksites & Associations P it later. The user name mu between 12 – 16 letters, m	ed. You'll also use your user Portal to complete your applic ust be between 6 – 16 letters	se these to log onto the Policyholder Portal name and password to log back onto the ation should you decide to save it and finish and/or numbers. Your password must be r, one UPPER case letter and one lower case	
after your policy is approv Worksites & Associations P it later. The user name mu between 12 - 16 letters, m	ed. You'll also use your user Portal to complete your applic 1st be between 6 – 16 letters nust have at least one numbe	name and password to log back onto the ation should you decide to save it and finish and/or numbers. Your password must be	
after your policy is approve Worksites & Associations P it later. The user name mu between 12 - 16 letters, m letter. Do NOT include spe	ed. You'll also use your user Portal to complete your applic ist be between 6 - 16 letters nust have at least one numbe cial characters (@,#,!, etc).	name and password to log back onto the ation should you decide to save it and finish and/or numbers. Your password must be r, one UPPER case letter and one lower case	
after your policy is approve Worksites & Associations P it later. The user name mu between 12 - 16 letters, m letter. Do NOT include sper <u>JohnClient1982</u> User Name Please enter a Security Q	ed. You'll also use your user Portal to complete your applic sits be between 6 - 16 letters nust have at least one number cial characters (@,#,1, etc). Password uestion and the correct and	name and password to log back onto the ation should you decide to save it and finish and/or numbers. Your password must be r, one UPPER case letter and one lower case	



STEP 10. Complete the Primary Applicant Information tab. The employer name and worksite group number or the agent's assigned number are prepopulated. Click **Next**.

Product Selection	Insurance App	plication				Previous	Nex
Primary Applicant Information	Primary Applicant Information						100
Coverage Selection - Critical Illness	Application for:	New Coverage	Reins	statement	Increase of Benef	its	
Insurability Information - Critical Illness	© Mr. ⊙ Mrs.	® Ms. 0 Dr.			02089M Group Number	_	
Existing Coverage and Replacement Question	VALUED	CLIENT					
Premium Payment Authorization	Name (First) 100 MAIN ST	(MI) (Last)		(Suffix)	Numbe	oyer Group er or Agent's	
Time to Sign - Primary		O. Box Not Allowed)				d Number will	
Notices to the Applicant					pre-	populate.	
	Apt. #						
	Charleston	South Carolina (SC) •	29424			
	City	State		Zip Code			
	Date of Birth (mm <u>Male</u> Female Gender	/dd/yyyy) Social Se Heigh		mber (or ITIN 6 in. Weight			
	How would you lik	te to receive your pol	icy:	® Pap	er copy via Mail 🔍 Elec	tronic via E-mail	
	abrown@yourlifeser		all policy del	iverv: cannot be t	he agent's e-mail address)		
	abrown@yourlifese		and beauting to be				

STEP 11. Complete the Coverage Selection tab. If additional family members are to be covered, a Dependent Information section will populate. Click the box beside to add additional dependents as needed. Click **Next**.

Application For: VALUED	Insurance Application Previous No.
APPLICANT	Coverage Selection - Accident
Product Selection	
Primary Applicant Information	Who is Applying for Coverage:
Coverage Selection - Accident	© Self-only © Self plus Spouse/Domestic Partner * © Self plus Chidren *
Coverage Selection - Hospital Recovery	® Self plus Unidren * ® Self plus Spouse/Domestic Partner & Children *
Medical Information - Hospital Recovery	Annual Benefit Bank:
Existing Coverage and Replacement Question	Enter a dollar amount between \$2,500 and \$25,000 * (\$100 increments) \$2,500
Premium Payment Authorization	Annual Deductible: ® \$100
Agent Information	
Time to Sign - Primary	Dependent Information
Time to Sign - Spouse	VALUED SPOUSE
Time to Sign - Agent	Spouse/Domestic Partner's (First) (MI) (Last) (Suffix)
Notices to the Applicant	Name
	Spouse/Domestic (mm/dd/yyyy) 000 - 000 - 0000 Spartner's Date of Birth Spouse/Domestic Partner's Gender:
	Children Date of Birth Gender Relationship First Name MI Last Name (mm/dd/yyyy) M F



STEP 12. Complete the Insurability Information tab if applicable for each applicant. A "Yes" answer to any of the insurability questions will alert you that the applicant is not eligible for this product. The alert will advise you if you have an option of going forward (for the applicant for example). If eligible, click **OK** and follow the instructions to remove an ineligible individual. Click **Next** when ready to continue.

Application For: VALUED	Insurance Appl	ication		Previous	Next
CLIENT	Insurability In	formation - Critical Illness			
Product Selection			Self	Spouse	
Primary Applicant Information		years, have you ever been diagnosed with, treated for, or received n a healthcare professional for any of the following conditions:		/ DP O Yes	
Coverage Selection - Critical Illness	heart disease, chro heart attack, angin	nic lung disease, major organ transplant, coronary artery disease, a, angioplasty, stent replacement or bypass surgery, atrial	No	® No	
Insurability Information - Critical Illness	brain aneurysm, st disease, cancer (inc	heart disease, carotid artery disease, cerebral vascular disease, roke (CVA) or transient ischemic attack (TIA), peripheral vascular cluding, but not limited to, carcinoma, sarcoma, Hodgkin's Disease			
Existing Coverage and Replacement Question	cell carcinoma), live	na, in situ, malignant tumor, melanoma and basal cell or squamou ar disease, impaired kidney function, diabetes, AIDS, HIV, ARC; or Autonomy disease (CODD)?			
Premium Payment Authorization	2. For any condition li abnormal diagnosti	If you answered "Yes" to any part of any question, PLEASE DO NOT CONTINUE. We regret that we cannot advise	O Yes	O Yes	
Time to Sign - Primary	by a healthcare pro undergo diagnostic	offer coverage to your spouse/partner at this time. If	® No	® No	
Time to Sign - Spouse Notices to the Applicant	 Within the past 5 y medical advice from 	section 2 in order to continue with the application process.	0 Yes	0 Yes	
nonces to the Applicant	incurcor advice inor	OK Cancel	® No	® No	
		eceiving or, within the past two years, have you received or applie Disability Income Benefits?	d 🛛 Yes	() Yes	
	for social security	Disability Income Benefics?	No	O No	
		Sa	ve Res	et Previous	Next

E-Application > Application

E-Application > Application

STEP 13. Complete the Existing Coverage and Replacement Questions. A "YES" answer to either question will populate a section for details of the existing coverage and an alert to submit the Replacement of Accident and Health Insurance Form which will be provided for signing later in the application process. The form is available to view by clicking its title. Click **Next**.

Application For: VALUED	Insurance Application Previous No.
CLIENT	Existing Coverage and Replacement Question
Product Selection	
Primary Applicant Information	✓ Critical Illness
Coverage Selection - Critical Illness	Will this policy replace any health insurance presently in force with:
Insurability Information - Critical Illness	LifeSecure? Oyes ® no Any other company? ® yes O no
Existing Coverage and Replacement Question	If "Yes", provide the details: Company Name: Sample Insurance Company
Premium Payment Authorization	Company Address: P O Box 0000 Lincoln NE 98516
Time to Sign - Primary	- OR -
Time to Sign - Spouse	Individual or Group Policy Number: 0000000000XX
Notices to the Applicant	
,	If "Yes", please also submit the required <u>Notice to Applicant Regarding Replacement of Accident and Health Insurance</u> Form.
	You may click on the Form to view it.
	Save Reset Previous No



STEP 14. Complete the Premium Payment Authorization tab. If Electronic Funds or Credit Card is chosen, a section will populate to provide the appropriate information. The default draft date is reflected however a drop-down box will populate so you can choose a different date between the 1st and 28th of the month if you prefer. Click **Next**.

Application For: VALUED	Insurance Applicatio	n			Previous	Next
CLIENT	Premium Payment A	uthorization				
Product Selection Primary Applicant Information	Complete this section to au		premium payment meth	od.		
Coverage Selection - Critical Illness	Automatic Credit Card	Payment				
Insurability Information - Critical Illness	Electronic Funds Trans	sfer (EFT)				
Existing Coverage and Replacement Question	Premium Payment Freque	ency:				
Premium Payment Authorization	 Monthly Quarterly Semi-Annually 		Product Critical Illness	Estimated Premium \$36.75		
Time to Sign - Primary	Semi-Annually Annually		Total	\$36.75		
Time to Sign - Spouse						
Notices to the Applicant	Select Card Type:	🖲 Visa 🔍 MasterCard				
	Credit Card #:					
	Expiration Date:	02 / 23				
	Name as it appears on Card:	Valued Client				
	Your default Credit Card C the month your premiums Preferred transaction date	s are charged?	ou want to pick another day	• of	Yes ONo	ļ

STEP 15. Complete the Time to Sign tabs. There are several screens to review and sign depending on the product (and if there is a replacement of existing coverage). Click the appropriate boxes and date. Click **Next** to progress through each required screen.



Application For: VALUED	Insurance Applicat	tion		Previous	Next
CLIENT	Time to Sign - VAI	LUED CLIENT			
Product Selection					
Primary Applicant Information	 Acknowledgements Premium Payment 				
Coverage Selection - Critical Illness	Application	Premium Payment			
Insurability Information - Critical Illness		Cardholder's Acknowledgement and S My signature represents my acknowledge	-		
Existing Coverage and Replacement Question		statements.			
Premium Payment Authorization		Clicking "Accept" represents my signature.	Critical Illness Critical Illness Review Payn	nent Selection	
Time to Sign - Primary		Accept Decline			
Time to Sign - Spouse		Date: 02/26/2019			
Notices to the Applicant				1	
		O Previous Item to Sign		O Next Item to	

Possible Forms for Signature:

- <u>Acknowledgements</u>. Mark the appropriate boxes and date. Click **Next** to move to the next form.
 - You can click on each of the form names to populate a pdf to view, save and/or print. These forms will also be in your policy delivery Welcome Kit.
- <u>Replacement</u> (if applicable). This form will populate if you indicated previously that this policy will be a replacement of another ancillary health policy.
- <u>Premium Payment</u> (if applicable). On the Line provided TYPE the Name as it appears on the credit card or the Name of the bank account owner. Click **Next**.
- <u>Application form</u>. Complete the City and State you are signing in. Choose the Accept or Decline box, and date. At the very bottom of the Application choose **Next** to move out of the forms section.

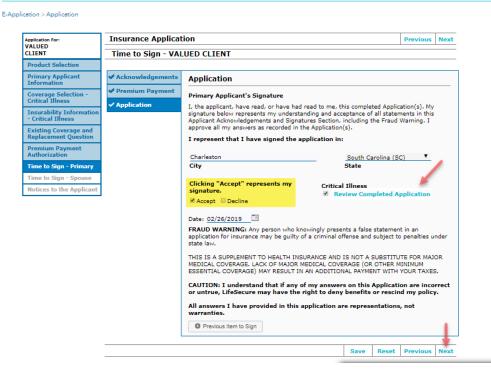
STEP 16. The Time to Sign tab is the precursor to submitting your application. Enter the city and state, click the appropriate boxes to confirm that you have reviewed the application and click Accept which represents your signature. (Click **Review Completed Application** to view your application which will populate on a separate tab in your internet browser.) Choose today's date and Click **Next**.

Note, if your spouse is included in the application a separate Application Signature page will populate following the Primary Applicant that will

Time to Sign - VALUED SPOUSE



E-APPLICATION	QUOTE CALCULATOR



STEP 17. The Notices to the Applicant follows the Time to Sign tabs providing information about LifeSecure Insurance Company. If you wish to choose a future effective date, there is an area to choose Yes and then choose the appropriate date within the allowed range (up to 60 days) of the calendar drop down provided. Choose **Submit Completed Application** to complete the application process.



Application For: VALUED	Insurance Application					
CLIENT	Notices to the Applicant					
Product Selection						
Primary Applicant Information	FRAUD WARNING: Any person who knowingly presents a false statement in an application for insurance may be quilty of a crir	ninal offen				
Coverage Selection - Critical Illness	and subject to penalties under state law.					
Insurability Information - Critical Illness	INSURANCE INFORMATION PRACTICES: To issue insurance coverage, we need to obtain information about you. Some of that information will come from you some will come from other sources. This information may, in certain circumstances, be disclosed to third parties w your specific authorization as permitted or required by law. You have the right to access and correct this inform except information that relates to a claim or civil or criminal proceeding. Upon your written request. LifeSecur provide you with a more detailed written notice explaining the types of information that may be collected, the types sources and investigative techniques that may be used, the types of disclosures that may be made without your authorization. a description of your rinbut to access and correct inform					
Existing Coverage and Replacement Question						
Premium Payment Authorization						
Time to Sign - Primary	and the role of insurance support organizations with regard to your information.					
Time to Sign - Spouse	If you would like more information about our information practices, please write or e-mail us at:					
Notices to the Applicant	LifeSecure Insurance Company 10559 Citation Drive, Suite 300 Brighton, MI 48116					
	info@YourLifeSecure.com					
	Do you prefer to pick a future effective date?					
	bo you prefer to pick a future effective date?					
	Please use the following date as the coverage effective date: 02/28/2019					

STEP 18. You will receive confirmation of the submission of your application. You may generate a PDF copy of the application now or wait to receive your copy with the policy delivery Welcome Kit. Click **OK** to exit.

The application(s) have been sub	mitted successfully!
The Accident Policy Number is LSQ0005370.	Accident PDF
Thank you!	
ОК	

(Note: Since agents are not involved in the self-serve application submission, they will not have access to a PDF copy of applications submitted by applicants via the self-serve portal.)



APPLICATION TIPS

- Do not use special characters or symbols in the E-Application; type the word out (i.e., type the word 'and' versus the symbol '&').
- If you choose an incorrect state-specific application, have made an error, cannot get back into your previously started application, or you need to start the application process over again, please call LifeSecure Insurance Company's Agent Support Department at (866) 582-7701, option 2; Monday-Friday, 8:00am – 7:00pm ET for assistance.
- It is recommended to click the Save button at the bottom of the page before moving forward. However, the system will auto-save information after the Applicant Information page.
- The application will allow you to save the application information prior to submitting it once you have passed the Applicant Information page. Click the Log Out button in the upper right-hand corner to exit the E-Application.

♦ lifesecure [®]	Need assistance? Please contact:
	jdoe⊚test.com 7:30am – 6:00pm EST.
	Welcome Log Out
E-APPLICATION QUOTE CALCULATOR	

To log back into your started application, return to <u>Your LifeSecure.com</u>. Go to Secure Login drop down to Worksites & Associations. Instead of entering the employer Group Number (or Agent Number), enter the User Name and Password you created previously. Click Login.

Note, if you forgot the User Name or Password click on the applicable link below the blue line to help locate your login credentials.

A https:	://ww	/w.yourli	fesecure.c	om/hom	ie.aspx												Q	*
Ops - Home	٠	Salesford	e for Outlo	💿 \	/elaro - Log	in 🚾	LifeSecure	Training	💰 Basec	amp HOI	ME (P) L	Log On - F	red Pryo	💠 LifeS	ecurePro	oductA		>>
												GET A	PPOINTED	REQUEST	Α QUOTE			
	\$	lifes	secu	re⁼				WH	O WE ARE	IND	IVIDUALS	EMP	LOYERS	CONTA	Work	Agents/Agencles		
						_												
User N	ame	•	2000000	202			_											
Passwo	ord						Login o appropr											
		-	Login			-	retri	ieve yo rmatio	ur									
				1		1				-								
Did you	forg	get you	ır <u>User N</u>	lame or	Passwo	<u>rd</u> ? W	'e'll help y	ou find	l them.									



Next, click the **Product link** to populate the started application. The application will open where you left off.

Application In Process:			
Product	Date / Time Started	Resume at Section	
Personal Accident/Critical Illness	2/21/2019 4:25:58 PM	Product Selection	
			Submit a New Application

If a question is skipped a warning message instructing you to go back and enter the required information will alert you. Once all required questions are answered, the warning message will disappear.

Application For: ANN BROWN	informat	You have missed some tion on this page. Plea and add the required a proceeding to the ne	ise scroll to		Previous	Next
Product Selection	Application for:	New Coverage	^O Reinstatement	Increase of Benefits		
Primary Applicant Information		o new coverage	- Kenstatement	00000v		
Coverage Selection - Accident	🖲 Mr. 🔘 Mrs.	© Ms. ◎ Dr.		Group Number		
Coverage Selection - Critical Illness	VALUED Name (First)	(MI) CLIENT	(Suffix)			
Existing Coverage and Replacement Question	100 MAIN STREET Street Address (P.	O. Box Not Allowed)				
Premium Payment Authorization				000 - 00 - 0000		
Time to Sign - Primary	Apt. # PHOENIX	Arizona (AZ)	▼ 85009			
Notices to the Applicant	City	State	Zip Code	-		
	® Male © Female Gender	/dd/yyyy) Social Sec Height	t <u>5</u> ft. <u>11</u> in. Weigh		× E-mail	
	brownsmith@att.ne		V			
	E-mail Address (red brownsmith@att.ne	quired for Electronic via E-ma t	in policy delivery; cannot be	the agent's e-mail address)		
	Verify E-mail Addr					
				Reset	Previous	Next

As you work your way through the application the tab guide on the left side of the application can be used to monitor your progress.

	Application For: Valued Client				
Product	Selection				
Primary Informa	Applicant tion				
Coverage Accident	e Selection -				
Coverage Critical I	e Selection - Ilness				
	Coverage and nent Question				
Premiun Authoriz	n Payment ation				
Time to !	Sign - Primary				
Notices	to the Applicant				

If you are having trouble submitting your application, please call LifeSecure Insurance Company, Agent Support Department at 866-582-7701, option 2, or email AgentSupport@YourLifeSecure.com. Monday – Friday, 8:00 am – 7:00 pm ET