AVMA LIFE Agency FAQ
How do I submit an application?
Applications can be submitted using one of the following methods:

**Fax:** 866.817.9009
ATTN: Affinity Department

**Mail:** AVMA LIFE Trust Program Administrator
1200 E. Glen Ave.
Peoria Heights, IL 61616

**Agent Notice:**
If transmitted by fax in lieu of submitting the original application to our office, the following process can be used:

If the application is collected directly by the agent on a face-to-face basis and faxed to us, it should be standard procedure for the agent to see a photo ID to confirm the applicant’s identity. This would allow us to accept faxed applications from the agents without requiring the original application. Without this ID, confirmation agents will be required to submit original applications in addition to the faxed applications.

Effective immediately, all applications submitted (whether faxed or mailed) must be currently approved AVMA LIFE applications that can be found on the AVMA LIFE website in the Agent Resources section under Applications. Any other existing applications should be discarded and not used.

Who do I contact with questions?

**For general questions:**
Contact a member of the business development team by phone at 844.282.2450 or by email at avmalifeagents@pearlinsurance.com.

**For billing and policy questions:**
Contact the customer service center by phone at 800.621.6360 or by email at customerservice@avmalife.org.

Can I access information for a member for whom I am not the agent of record?
No information will be released to an agent unless he/she is the agent of record on the policy. This helps protect agents and members who have already established a relationship with one another. However, an agent may submit a written request to acquire agent of record status to customerservice@avmalife.org.
Can my customer service representative, office manager, or other member of my operation receive information on a client for whom I am the agent of record?

We will release a member's information to a representative of your operation if the representative identifies himself/herself, states that he/she is calling on your behalf, and explains his/her relationship to you (e.g. office manager or customer service representative).

How do I request a collateral assignment/transfer of ownership?

You can request a collateral assignment using one of the following methods:

**Email:** customerservice@avmalife.org

**Fax:** 866.817.9009

ATTN: Affinity Department

**Mail:** AVMA LiFE Trust Program Administrator

1200 E. Glen Ave. Peoria Heights, IL 61616

How do I report a claim?

To report a claim, an agent or the member should call 800.621.6360, then select 0 and then 3 to reach the claims department.

How do I make a change to a member’s record?

You can make changes to a member’s record by submitting an electronically written request to customerservice@avmalife.org.
How does "Get a Quote" on the AVMA LIFE website work?
The "Get a Quote" feature is used by both members and agents. If a member completes a quote and requests a follow-up from an agent, the AVMA LIFE Trust Program Administrator will identify the member's agent on record or distribute the lead using the "Find an Agent" feature, which identifies an appropriate agent.
Agents using the "Get a Quote" feature on behalf of a member should select "Print Quote." Then, select "Print to PDF" to save as a PDF document to your computer.

What is the process for becoming a member's agent of record?
To become a member's agent of record, you must complete the following steps:

1. Complete the approved AVMA LIFE agent of record form and obtain a signature from the member. The form can be found on the AVMA LIFE website.

2. Send the completed form to customerservice@avmalife.org.
If we receive an agent of record form for a member who currently has an active agent, we will send a rescinding email to the current agent of record. He/she will have five days to submit a countermanding agent of record letter.

What is my agent/ agency number?
As the new AVMA LIFE Trust administrator we will not use agent/agency numbers. We will add agents by simply selecting your name if you add it to the application legibly.

What do I need to know about splitting commissions?
In the event two agents are working the application together there are two steps that need to take place:

1. Designate who the primary agent is; this will be determined by the first agent name on the application

2. Designate the commission split between the two agents
Primary Agent: The primary agent is the individual that would receive the credit for the policy and the premium at the sale and into renewal. Both agents will receive the commission but only one will receive credit for the premium and policy in the total of their book of business.
AVMA LIFE Website: Agent Overview

Agent Resources

The Agent Resources section of the website offers you access to tools and resources including:

- Broker portal (view your submissions and manage your book of business)
- Quote generator
- Application downloads
- Product information
- Request for convention materials, marketing literature, or custom materials
- Business card order form
Agent Portal

The agent portal allows you to monitor your submissions and manage your book of business. You can access the portal on the agent resources page under Manage Your Account.
Portal Navigation

- Use the buttons in the upper right-hand corner to navigate between My Submissions, My Book of Business, and to Logout of the portal.
- Use the Export to Excel button to export and view a listing as an Excel document.
My Submissions

Upon logging in, you will be directed to the My Submissions screen:

- The portal will show all your submissions within the last 30 days by default
- Use the arrow button to display a search filter allowing you to search submissions using first name, last name, application number, or a custom date range
- Use the Search button to execute your filtered search or the Clear button to clear the fields and start over

- By default, the submission list sorts entries alphabetically by last name
- Use the small arrows next to the column headings to sort by any column
- Note: The Date Closed column is the effective date of the application
My Book of Business
The My Book of Business screen requires you to enter search filters before a listing is displayed.

- Filter your book of business using any of the following fields: first name, last name, certificate number, Pearl ID, or status
- Use the Status dropdown and select Active to quickly view all active contracts
- Use the Search button to execute your filtered search or the Clear button to clear the fields and start over
- Use the small arrows next to the column headings to sort by any column
- Certificate Number, Phone Number and Email are hyperlinks
- Click on a Certificate Number to view more details about a client’s policy and billing
My Book of Business (Continued)

- Policy information is displayed at the top of the screen
- Billing details (within the last two years) are displayed at the bottom of the screen
- Select the billing period you want to view by selecting the small circle to the left of the period dates
- Selecting a billing period will expand the view, showing a breakdown of costs and payments associated with the policy for that billing period
- Click on Download as PDF to view a PDF copy of your client’s bill
Get a Quote

To generate a quote for your client, access Get a Quote on the agent resources page by selecting Get Started. This is the same tool available to prospective members visiting the AVMA LIFE website.
Starting a Quote

Once you select **Get Started**, you will be directed to the **Get a Quote Today** screen.

- To start a quote, select the appropriate information on page 1 and click **Next**
- Please note: Do not use your browser’s back button while using the **Get a Quote** feature
**Spouse Information**

- If you indicate that your client has a spouse he/she wishes to cover, you will be brought to a second screen.
- Select the appropriate information for the spouse and click **Next** or **Back** to return to the first page.

![Image of spouse information form]

**Product List**

You will then be brought to a list of products that your client is eligible for based on your selections on the previous page(s).

- Select the products for which you wish to receive a quote by selecting the checkbox next to each product.

![Image of product list]

---

13
Product Selection (continued)

- Choose the desired coverage amount for the quote by moving the slide indicator or by typing a dollar amount in the box
- Click **Next** at the bottom of the screen
Quote Preview
You will then be brought to a preview of your quote.

- Use the checkboxes to select the products you want included in the quote
- Choose how you want the quote delivered by clicking Print Quote or Email Quote
- Note: Contact Me About This Quote will typically be used by prospective clients generating a quote through the AVMA LIFE website
- Choose Back if you want to go back to the previous screen to edit your products and/or coverage amount
Personalize
To personalize the quote, you will be brought to a screen to enter your client’s information.

- When finished, select **Print Quote**

Selecting **Print Quote** will result in a PDF version of the quote outlining coverage and premium options.
Requesting Tradeshow Materials, Marketing Literature, and Custom Pieces

On the agent resources page, select **Make a Request** in the lower right-hand corner. This will bring you to the materials request form.

Using the 3 tabs at the top of the materials request form, you can make requests for tradeshow materials, marketing literature, or custom marketing materials.

- Click the tabs to view the different request forms
- Please allow 1 day for fulfillment and 7-10 days for delivery of tradeshow an marketing literature