

Get set up to run quick and easy quotes for your clients.

iPipeline Quoting Guide

Step 1: Create your account.

The screenshot shows the 'Login' page with fields for Username and Password, a 'Log In' button, and links for 'Forgot your username or password?' and 'Need help logging in?'. At the bottom, there are two buttons: 'Create an account' (highlighted with an orange box) and 'Update your account'.

Click **HERE** to set up your account. On the login page, choose “Create an account”.

The screenshot shows the 'Create New Account' page. It includes a header, a note about required information, and a 'User Information' section with fields for First Name, Last Name, and Email. At the bottom, there are 'Submit' and 'Reset' buttons. The 'Submit' button is highlighted with an orange box.

Complete the following information and click submit.

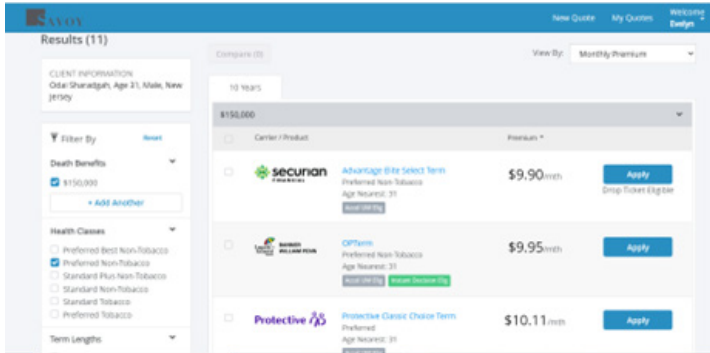
Step 2: Start quoting.

The screenshot shows the iPipeline quoting interface. The top navigation bar includes 'New Quote' (highlighted with an orange box), 'My Quotes', and 'Welcome Cynthia'. The main form is divided into sections: 'Gender' (Male/Female), 'State' (New York), 'Product Information' (Term, Product Group, Term Lengths, Death Benefits, Riders), and 'Underwriting Information' (Health Class, Table Ratings, Flat Extra \$, Underwriting Process Eligibility). At the bottom, there are 'Show Top 10' and 'Get Quotes' (highlighted with an orange box) buttons.

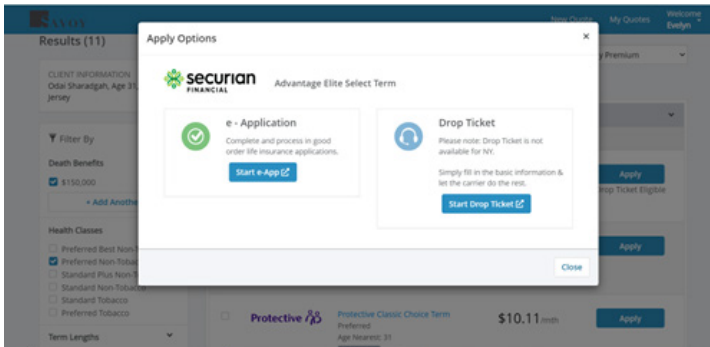
Once logged in, select “New Quote”.

Add your client’s information, product details and underwriting information for quoting. Then click “Get Quotes”.

Step 3: Review carrier / products available for comparing.



Step 4: Start application process.



Click “apply” next to the carrier/product your client is ready to enroll in.

Based on the carrier/product selected, you will be provided options to either “start e-App” or access the appropriate carrier forms.

Questions?

Our team is ready to help. Contact us to learn more about our quoting tool and how you can provide your clients access to valuable next-level benefit solutions—Life, Disability, and LTC.



Email us at individuallife@savoyassociates.com and a member of our team will be in touch.