

The Life of a 1-Page Application

Submit the 1-Page Application

Submit your application to apps@tba.com

Accelerated Underwriting (AU)

Requirements for AU differ for each carrier that offers it. This process requires no lab work if qualifications are met

Traditional

This is any application that does not automatically qualify for AU and will be completed on paper

Interview & Medical Questionnaire

The carrier will reach out to your client to complete the Interview & Medical Questionnaire via email or telephone

Process Application

TBA will contact your client and complete the application. Signatures secured electronically via DocuSign

Contracting

If you are not already contracted with the carrier, TBA will contact you to complete the process

Carrier Review

Once the carrier has received all the required information the application/case will be reviewed

Exams Requested

TBA or the carrier will request all required exams for your client

More Information

If the case no longer qualifies for AU then labs and/or APS will be ordered

Medical Records

TBA or the carrier will order for each case once carriers request

Decision

When a carrier decides on a case we will inform you of the decision

Carrier Review

Once the carrier has received all the required information the case will be reviewed

Delivery

AU cases will be delivered electronically for signatures

Decision

When a carrier decides on a case we will inform you of the decision

Delivery

Cases will be delivered either electronically or paper copies depending on the carrier specifications for signatures



Due to carriers changing requirements and processes, this is subject to change.