

Advisors Step by Step Guide to 1-Page Application

Step 1 - Obtain quote for coverage from TBA, www.TBA.com or TBA mobile app.

Step 2 - Work with TBA and/or client to determine best product and company.*

Step 3 - Complete the [TBA 1-Page Multicarrier Application](#) online or using fillable .pdf.

Step 4 - Fax (865-588-9577) or Email application (apps@tba.com) to TBA.

Step 5 - A licensed TBA employee will contact your client via email to set up a time to complete paperwork over the phone.

Step 6 - TBA conducts a 10-20 minute phone call with your client to complete all needed paperwork for the company you have selected.

Step 7 - A link to the completed paperwork is emailed to your client for electronic signatures using our *DocuSign* account. Once they e-sign, paperwork is automatically emailed to Advisor for their electronic signatures using *DocuSign*. Once they e-sign, paperwork is routed to TBA.

Step 8 - Completed paperwork is entered into TBA administrative system and securely imaged to carrier. At this point, TBA will also order exams as well as any other reports needed for underwriting.

Step 9 - Case status is communicated with advisor throughout the underwriting process until a policy is approved and issued.

Step 10 - Policy mailed to advisor for delivery to client.



Want more information on how we can help you become more efficient and effective using our [1-Page Multi-Carrier application?](#)

Give us a call!

(800) 624-4502 or (865) 588-9555

www.TBA.com info@tba.com