Directions for IGO e-App:
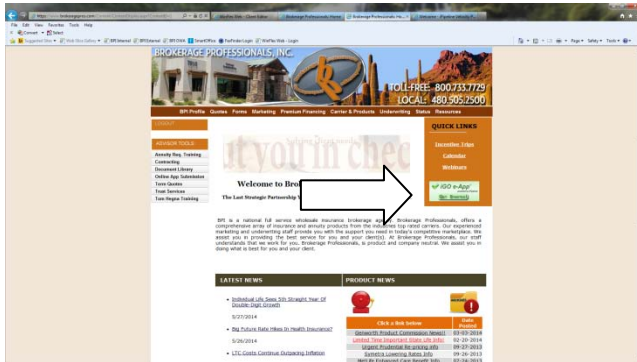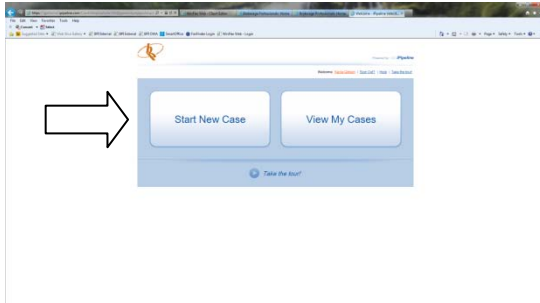
1) Go to the Brokerage Professionals, Inc. Home Website (www.brokeragepros.com).
2) Select the "√ iGO e-App Get Started" green box from the right of the screen under Quick Links:

3) This will take you to a new screen (https://igoforms2.ipipeline.com/CossEnterpriseSuite/(S(efiabry1mzkg5wnhyp2kbhmo))/webforms/StartUp.aspx), where you should select "Start New Case".



4) From the Start New Case, you should fill in the basic information on the client (required fields will be highlighted in yellow) and you are also able to notate with a "Case Description". Please complete the pertinent information (especially the "Carrier and Product" sections from the drop down selections available). Finally on this page you will select "Find Available Products" to proceed.
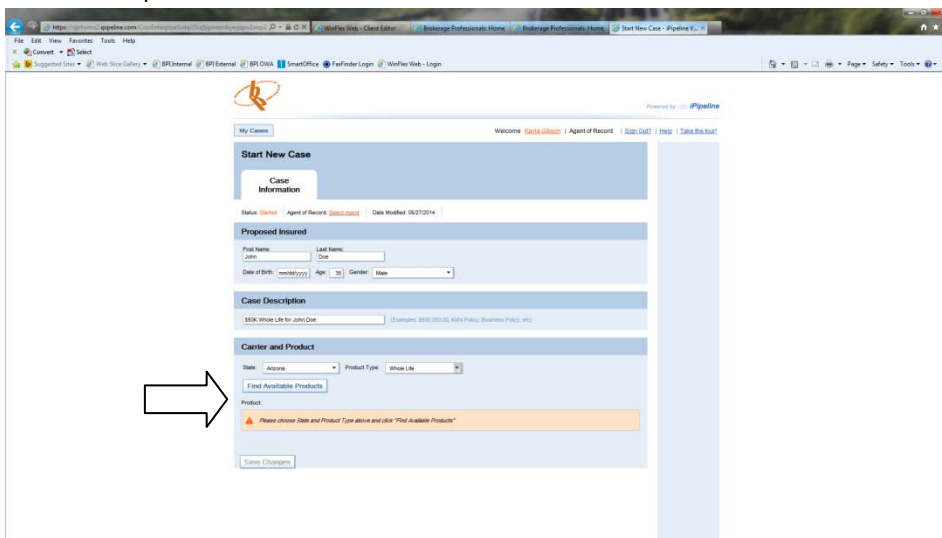
5) From the list of carriers that come up, please "Select" the desired Carrier/Product for your case:
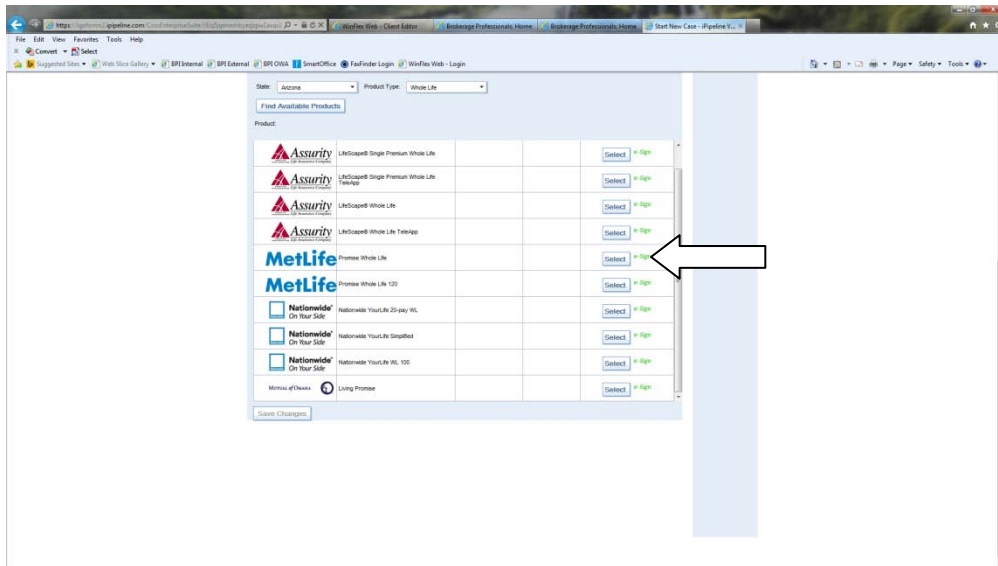
6) The Carrier and Product specific Application will display for this case. You will need to complete all missing fields highlighted in yellow for each of the parts of the application using the "Next" button to move through each section (First – Insured/Face/Owner/Bene; Second – Payment/Riders/Purpose; Third – Producers; Fourth – Illustration/Producer Cert; Fifth – Existing/Applied for Ins; and Finally - Validate And Lock Data).
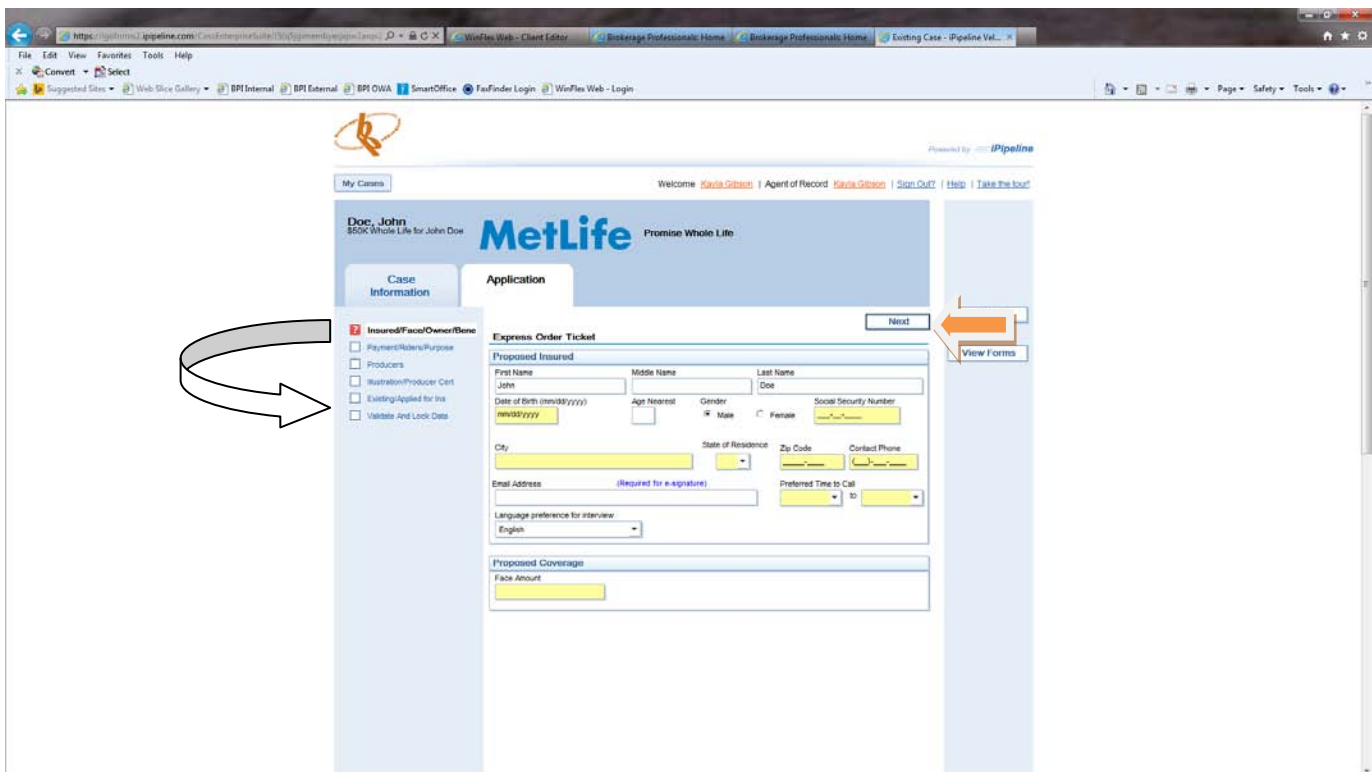
7) On the final "Validate And Lock Data" tab, the system will tell you with a red **?** if there are any incomplete items. Once all tabs show a green **√,** you may proceed by selecting "Lock Ticket and Proceed to Signature Process".

8) Then select "Next" to proceed. You can then select a signature method of "e-Signature using E-Mail" or "Wet Signature" that will allow you to print, review, and physically sign to submit via fax or mail.

9) Depending on your selection your client will be emailed the forms for their "e-Signature" or you will be able to "View Forms" to have the client physically sign the application. You should also select "Save" from the right side of the screen (just-in-case).

10) Once the application is submitted (E-Signed Electronically or Paper Forms signed and faxed/mailed), the application will then go to the Carrier's Underwriting for their life insurance processing. This process can get your client issued more quickly and you paid your commissions faster upon issue.

11) If there are any questions, please feel free to reach out to your Brokerage Professionals Underwriting Team at any time (underwriting@bpim.com or 480-505-2500).