Atlantic Brokerage Partners, LLC

Let Us Help You Close the Sale!

Applications are available for the carriers we represent. Follow these simple instructions to assist you in selecting the correct forms.

- Choose the state the case will be signed in.

- Different carriers go by different names in different states. Look at the quote to see the actual carrier name you are looking for forms for.

- Choose the product type you are selling, for example: Term, Whole Life, Universal Life.

- Choose the product name.

- This will bring up a list of forms. The basic required forms are generally highlighted. You need to add any additional forms based on your specific case. You can click on the magnifying glass to look at the form to determine if it is what you want. There are also forms notes on the far side that give helpful hints.

Here are some common additional required forms.

- If you are replacing coverage make sure to get the replacement forms.

- Is your client over age 60? Some carriers have an additional form.

- Are there and special questionnaires needed. For example; travel, income, residency, trust docs, aviation, financial (generally at or over 500k).

- Is it a business case? If so employer notification forms might be needed.

Once you have done this a few times it will be the most effective way of ensuring the correct and most up to date forms are submitted, avoiding the need to correct, re-submit and lengthen the underwriting process. Please feel free to contact us to walk you through the process.

Please contact us if the forms you need are not available.