



YOU quote; WE take case to the finish line!

GPEZ Concierge Service

An application service available through GPAgency for fully underwritten life insurance plans.



If you're tight on time, let us do the rest. For a one-time \$50 fee, we will complete your client's application on your behalf.

What YOU do?



1. Present the quote to your client. If they want to move forward, use the **GPEZ Insurance Request Form** to collect key, high-level information to initiate your client's insurance application. *Be sure to complete ALL sections.*
2. Provide your client with:
 - **HIPAA and Nonpublic Personal Information forms**; have them sign/date and return to you
 - Provide them with the **Interview Preparation for Life Insurance** piece
3. Complete the **GPEZ Agent Signature Form**, which gives us permission to communicate and finalize the client's application on your behalf.
4. Promptly email, fax, mail, or deliver ALL forms listed above to **GPAgency**:
Email: GPEZ@gpagency.com
Fax: (877) 821-7191
Mail: PO Box 20729, Raleigh, NC 27619
Delivery: 3820 Merton Dr., Suite 100, Raleigh, NC 27609
 (Hours ▶ M-Th: 8:00 am - 5:30 pm / Fri: 8:00 am - 3:00 pm)

What WE do?



1. Upon receipt of the form, we will contact your client within 24 hours during the date/time requested on the **GPEZ Insurance Request Form** to conduct a 15-20 minute phone interview. During this interview, we will complete the full application, including ancillary forms, and schedule the client's physical exam.
 2. After the phone interview, we will obtain the client's signature via e-sign or Fed-Ex and sign the application on your behalf.
 3. We'll submit the completed application, on your behalf, to the appropriate insurance company.
 4. Upon submission, you will be notified and, thereafter, you will receive a weekly email on your case's status.
- Please note**, if we find that your **GPEZ Insurance Request Form** or phone interview contains information that will prevent your client from receiving what you quoted, we will put the case on hold and contact you immediately.



One-time fee of \$50 per GPEZ Insurance Request Form, which will be assessed by signing for a percentage of your commission that is equivalent to this amount. Once the \$50 has been satisfied, this commission assignment will end. Consent for payment is addressed in the **GPEZ Agent Signature Form**.