National Life Group®

A Better Experience Awaits

Ascend

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A **Better Experience** Awaits

Ascend modernizes our life new business and underwriting platform.

You'll experience:

Visibility throughout the entire New Business and Underwriting process.

Efficiency with applications that can be submitted and issued in the same day.

Ease with Exam and Lab ordering by National Life Group.

Control with Enhanced Mobile App & Portal tools to manage your business.

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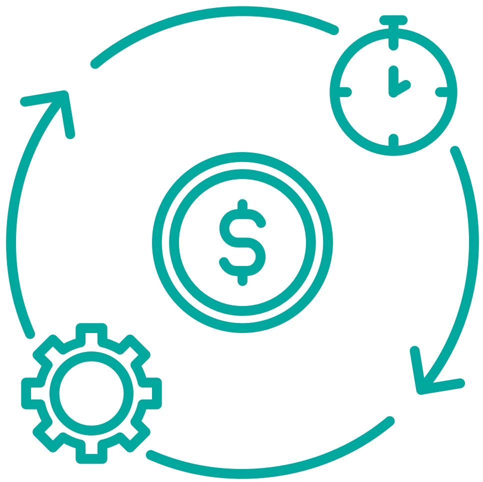
More efficiencies in the new platform keep Life business moving smoothly.



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Same day submit to issue!

Ascend

Tentative Underwriting Rating	New Policy Illustrations	Electronic Application	EZ Underwriting	*NEW* Same Day Issue	eDelivery & Policy Promise

Not available in NY
CTP must be less than $50,000 and Face Amount must be less than $2,000,000 to be eligible

The fastest possible handling happens when your case is…

Face amount $2M or less

CTP is less than $50K

Outside of NY
(NY cases can't be same-day-issued)

Approved as applied for or better

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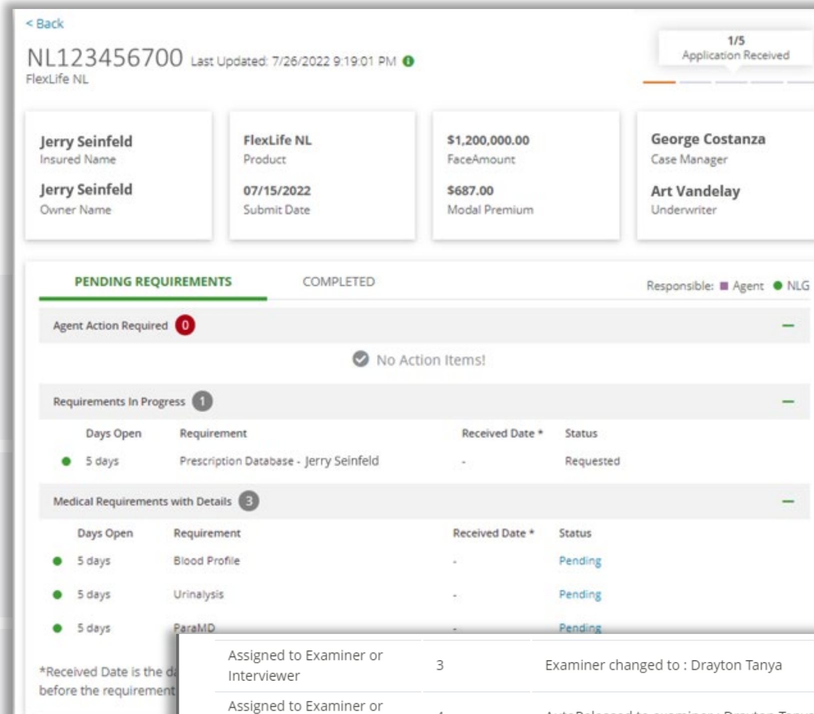
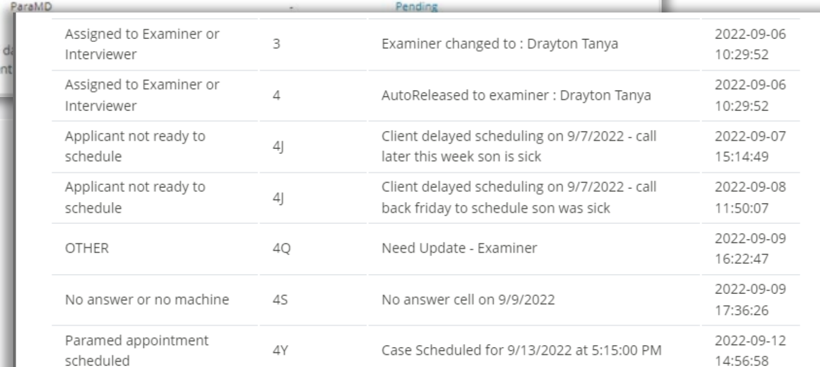
National Life saves you time by ordering exams, labs, and APSs if needed.





Click on the Status link to view current requirement status

Customers will receive a call to schedule exams/labs within 24-48 hours

Pro Tip:

- Subscribe to SMS alerts to be notified if exams/labs are being ordered
- Then inform your customer so they are prepared when the lab contacts them

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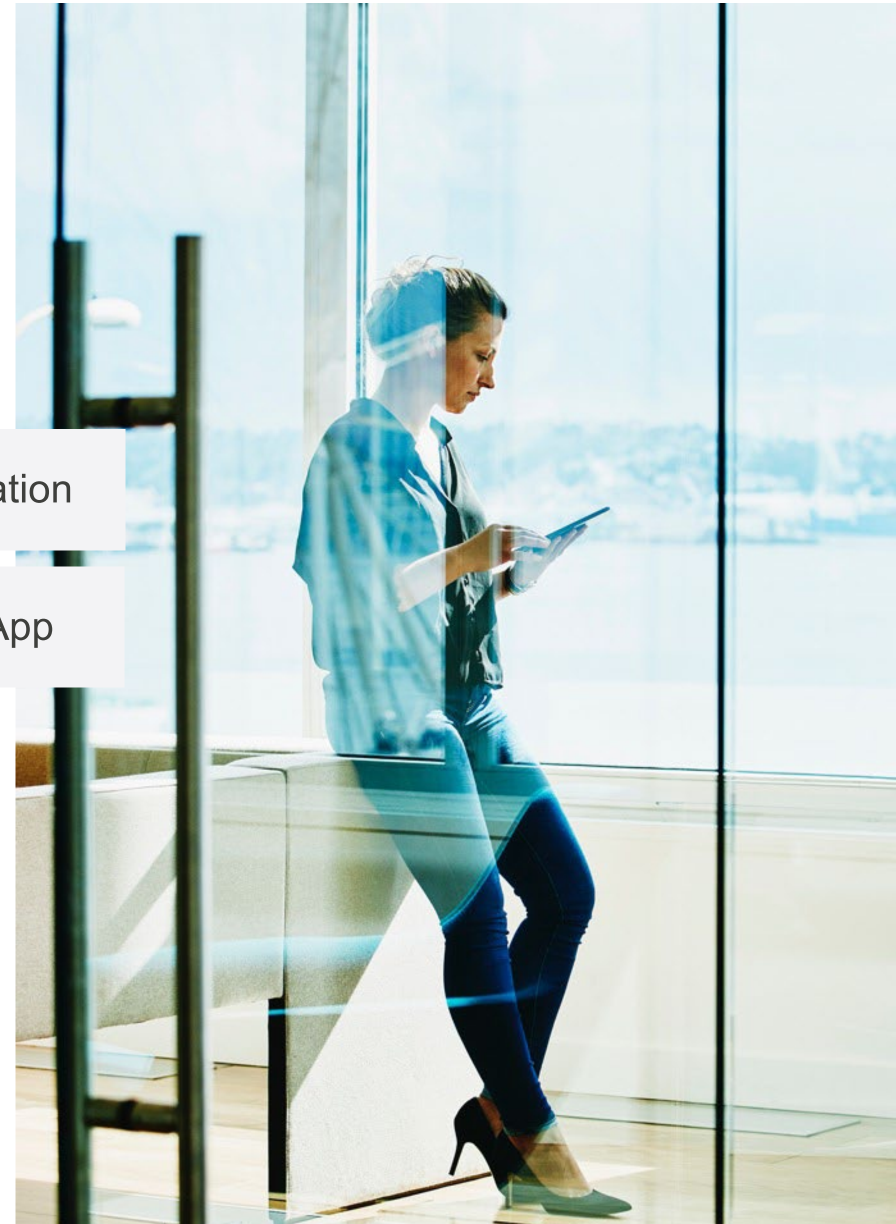
Increased clarity and visibility throughout the entire New Business and Underwriting experience

- Agent and agency can see all Case Communication
- Tools available on the Agent Portal and Mobile App



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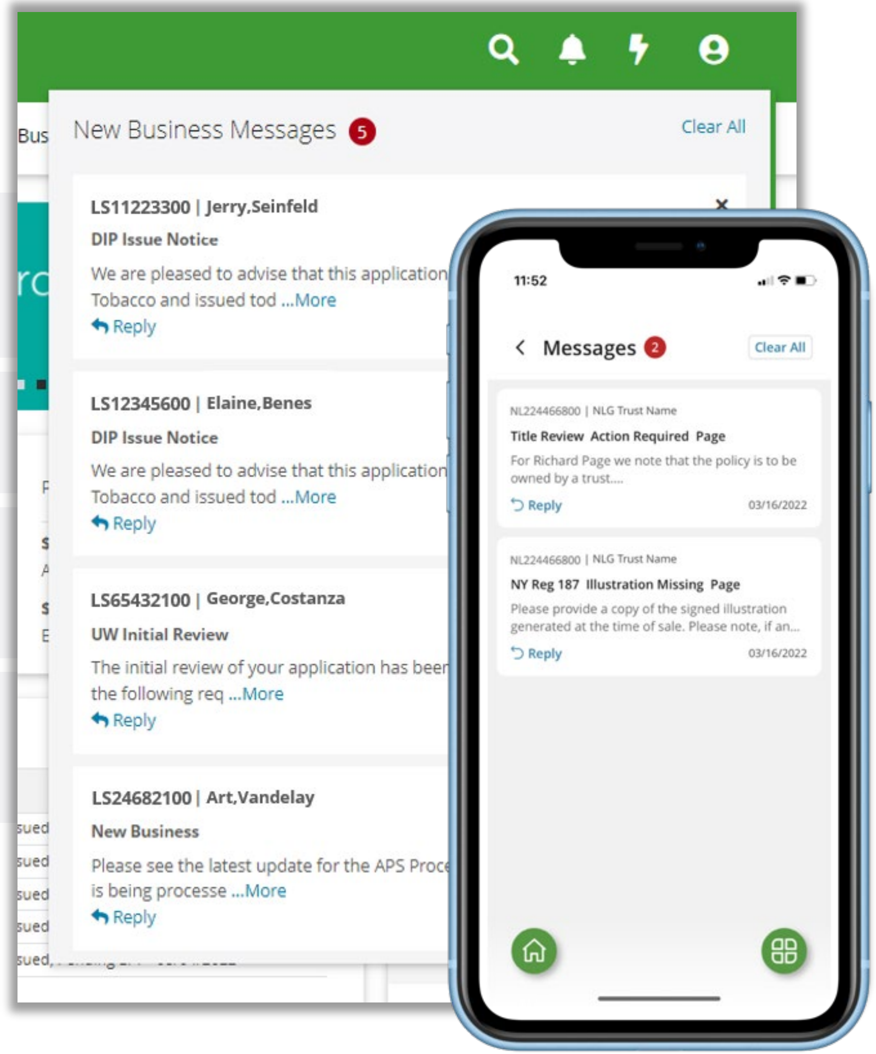
Agent Message Alert – Portal/App

Quickly and easily identify new messages on your personal business

Click on the message to go directly to the case

Pro Tip: Download the Agent Mobile app and subscribe to push notifications

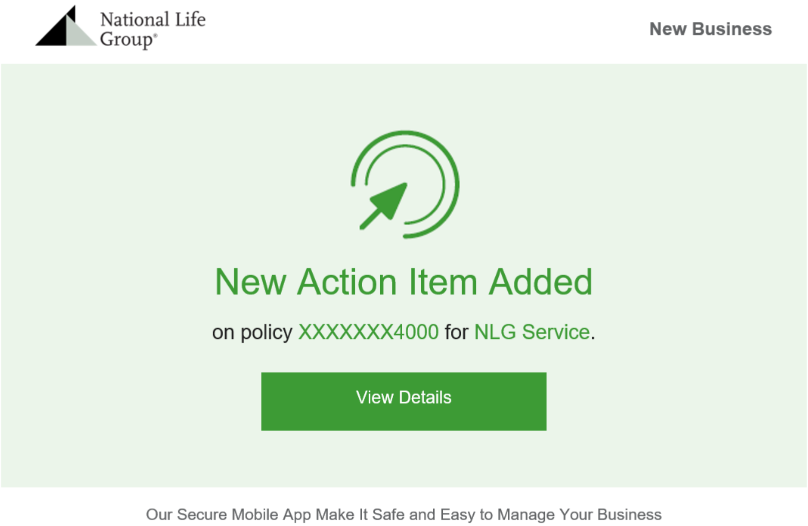
Pro Tip: Subscribe to text and email alerts through Notification on the Agent Portal*



*Representatives of Equity Services, Inc. must use their CellTrust mobile number for all business-related text communications.

Email Alerts

- Easily view messages in the Agent App or Agent Portal with a single click
- Leverage increased security
- Keep on top of business with alerts via text



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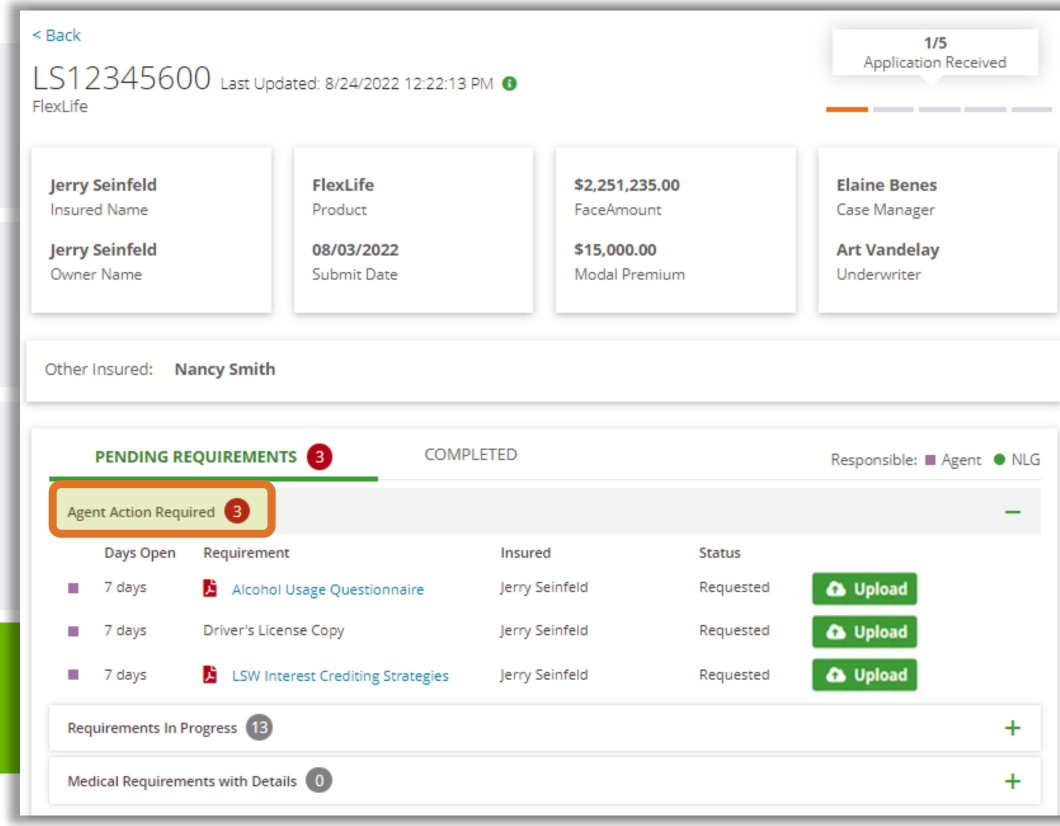
Agent Action Required

Easily identifies requirements needing agent attention

PDF forms can be downloaded by clicking the requirement name

NLG-responsible requirements and Medical Requirements can be viewed by expanding these sections

Pro Tip: Upload requirements through the Mobile App or Portal for faster review



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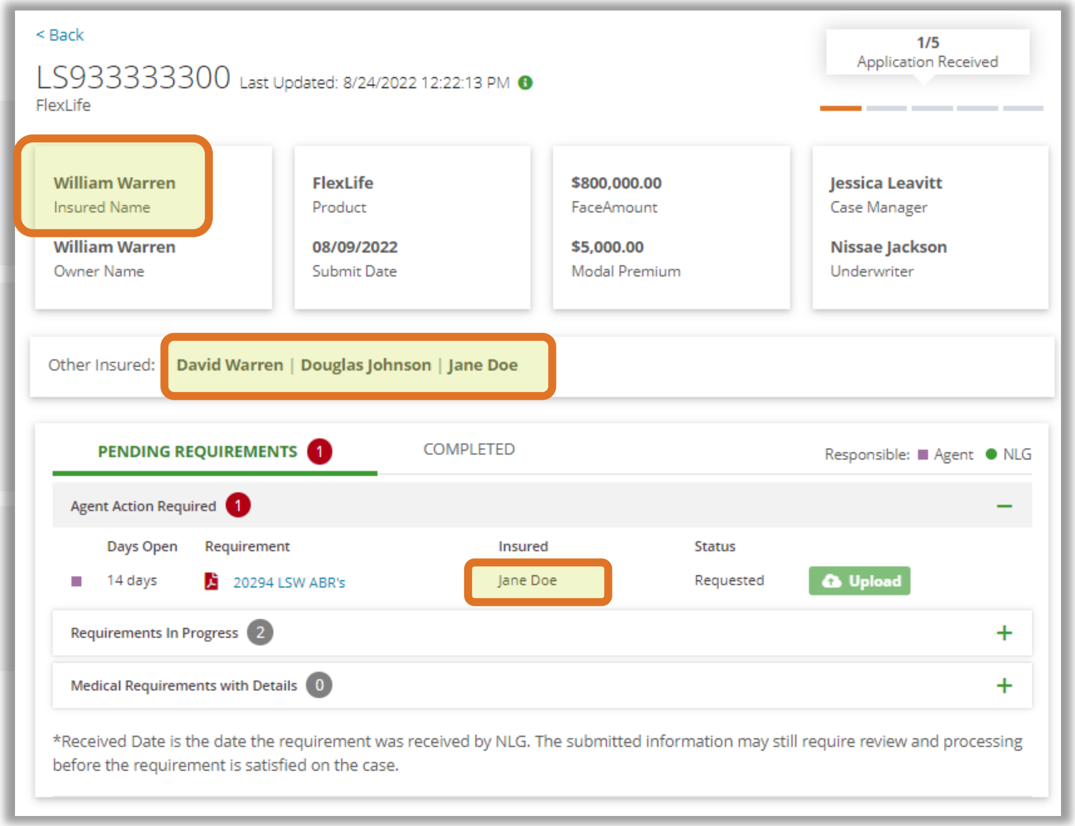
Cases with **Multiple Insureds**

See all insured parties on the base policy

No need to click on multiple policy numbers to see requirements for all insureds

Requirements clearly indicate to which insured they apply



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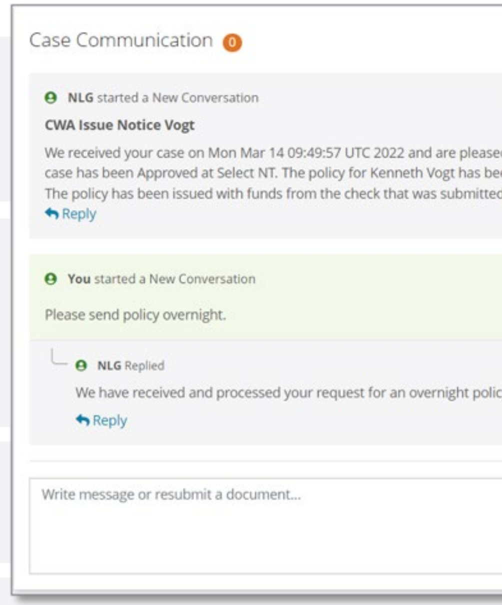
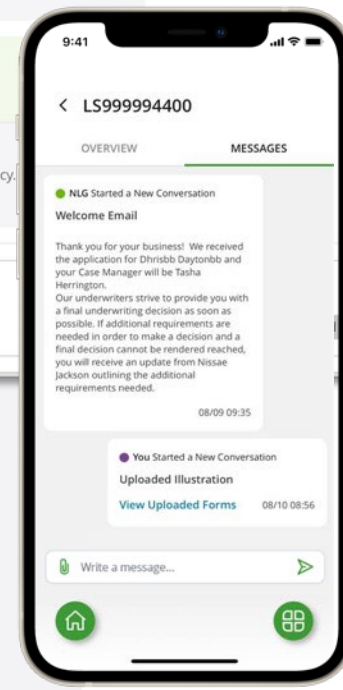
Case **Communication**

- Send messages securely through Case Communication on the Portal or Mobile App
- New Business and Underwriting messages will appear in their entirety – no need to look for emails in your inbox!
- Reply to messages or start a new thread
- All messages can be viewed throughout the underwriting process
- Attachments can be uploaded with your message

Pro Tip: Messages are synced across the Portal and the App so you're in the know when you're on the go!





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Document Upload - Portal

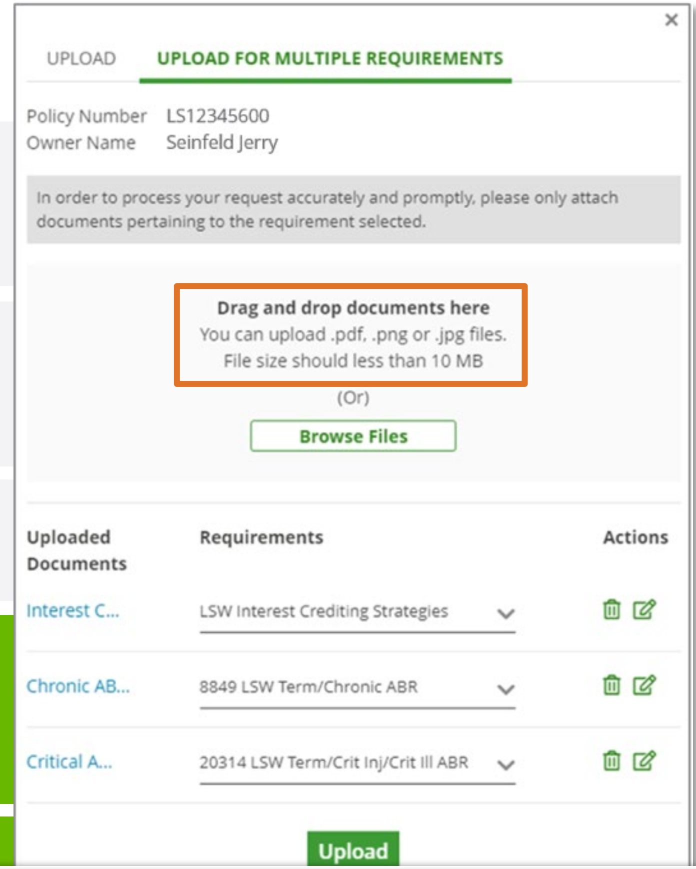
Securely upload documents directly in the **Agent Portal or Mobile App**

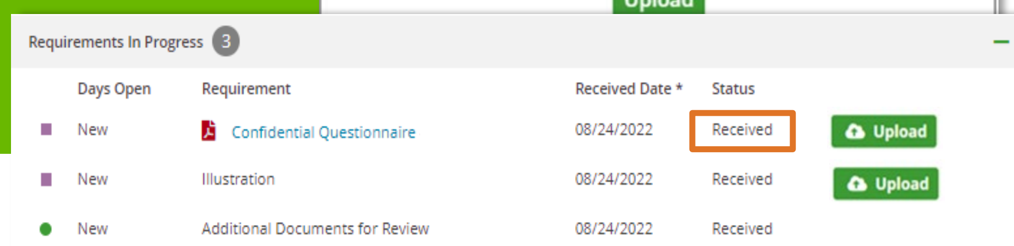
In Review status gives immediate acknowledgement of receipt

Upload multiple files at one time

Pro Tip: Documents uploaded online can be viewed throughout the underwriting process

Pro Tip: Scan one requirement per file.





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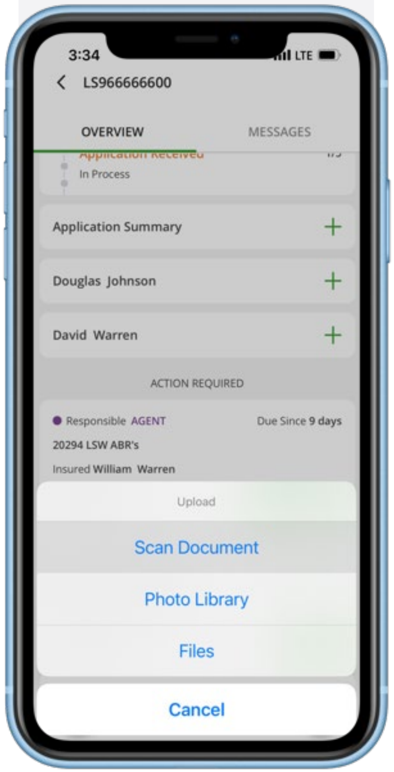
Document Upload – Mobile App

1



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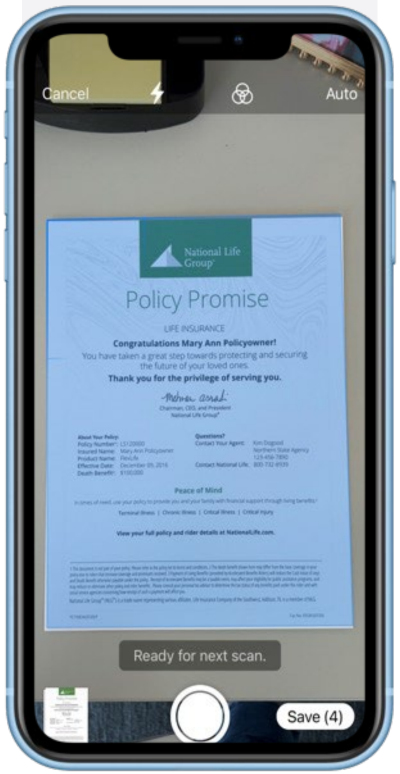

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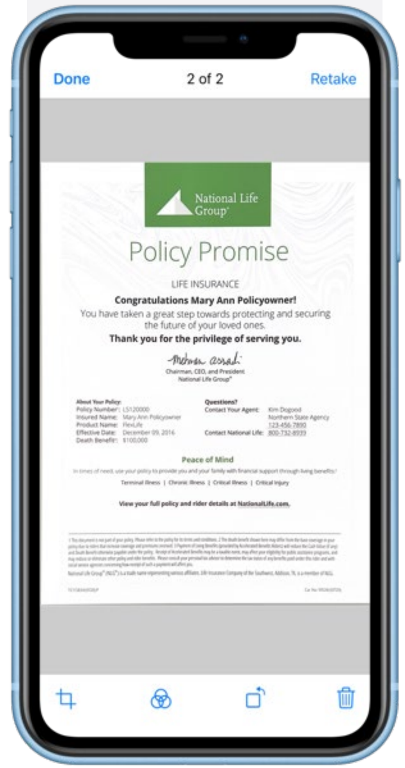

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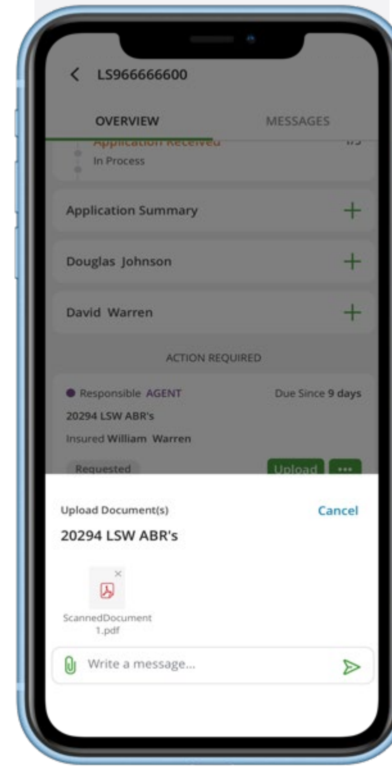

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Transition **Details**

Business will be processed in Ascend

Reminder: These changes apply to Life business

All cases submitted before the launch of Ascend will remain in the current system through final decision and you will have the same agent portal/mobile app tools that you have today

- Current notification selections will continue

Most applications will be processed on the new system

- *Exceptions:* SIUL, pension business and group business

All cases submitted on or after the launch of Ascend will be processed in the new system and you will have access to all the new tools on the Agent Mobile App/Portal

- All messages will be viewable on the Agent Mobile App or Portal
- Email alerts will link you to the app/portal to view messages
- You may opt into text alerts in Notification preferences
  – Be sure to select Action and Status Update notifications

Next Steps

Ascend

1	Download the Agent Mobile App
2	Subscribe to text alerts for annuity and current life business
	Log onto Portal; make selections in My Account – Notification Preferences

Download Our Mobile App

Download on the App Store

GET IT ON Google Play

Questions?

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