

Electronic Policy Delivery Getting Started Guide

Protective Life's electronic policy delivery (EPD) option allows you to deliver your clients' policies with a secure email link—helping them protect their tomorrow so they can embrace today. EPD is available when:

- There is only one insured in the life insurance policy
- The resident state is not New York
- The agent has an active appointment with Protective Life
- We have a valid email address for you and your client



Once underwriting is complete and the policy is approved and issued, you will receive an email from Protective Life containing the link to a secure site to access your life insurance policy contract. Please add epdagent@protective.com to your email address book to ensure our emails are received.

Upon your release, your client will receive an email from epdcustomer@protective.com including a link to the secure site where they can access their life insurance policy and related information.



After following the online registration instructions, your client will be asked to review and electronically sign any applicable policy documents.



If needed, your client will also have the ability to make their first premium payment online.



Your client will need to complete the electronic delivery process within 10 business days, or the policy will revert to paper delivery and will be mailed to your office.

Tracking your electronic policy deliveries

You can track the status of your electronic policy deliveries by selecting the “Electronic Policies” link under the “My Business” option on MyProtective.com. Once the policy is placed in force, a copy of the policy and delivery requirements will be available for you to review or download for 20 days.

Delivery Method Options

If it meets the criteria, you can automatically enroll all of your policies for EPD instead of entering your policies individually. Once enrolled, the policy can be sent directly to the client. Or it could be sent to you or your BGA to deliver to your client.

Tips for Success

- Add epdagent@protective.com to your email address book to ensure you receive EPD notifications
- Tell your clients what to expect from the EPD process and provide them with a copy of the available Understanding Electronic Policy Delivery flyer



Eliminate the hassle of paper policy delivery with EPD. **Get started today.**

Questions? Contact our sales desk at 877.778.3500, option 1 for additional information or assistance.

Life insurance policies issued by Protective Life Insurance Company, Birmingham, AL.