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# MONTHLY OVERVIEW

[Annuity All Product Summary](#)

[Life All Product Summary](#)

March 2020

## New Remote-Sales Procedures

- **Remote Application Disclosure Form Allows You to Submit Applications Without Face-to-Face Meetings**

If in-person meetings aren't an option, selling EquiTrust annuity and life products by phone or by video messaging is enabled with the Remote Application Disclosure form – [click here](#)

- **Revised Guidelines for Conducting Telephone Underwriting Interviews Remotely**

The telephone underwriting interview may now be conducted from separate locations. After the application is completed, follow these revised steps for the telephone interview – [click here](#)

- **E-App for Remote Sales is E-Z!**

Learn more of the business advantages of E-App: [Click here to watch 3-minute E-App video](#), or [click here to view printable E-App flyer](#).



## Coronavirus Update

**EquiTrust Operating at Full Capacity After Successful Transition to Work-From-Home Environment**

In response to the potential COVID-19 pandemic, we have implemented our business continuity plan – which examines all areas of business operations – and have taken actions to ensure continued service to our sales partners and customers. We have successfully implemented a work-from-home environment so employees can perform their job functions remotely. [Read More](#)



## Sales-Idea Recap

Sales Ideas! Sent to You in March Issues of SALES WEEK:

- [Which Income Benefit Rider Is Best Suited For Your Client?](#)
- [Offer Your Market-Wearied Clients Accumulation...WITH GUARANTEES!](#)
- [Your Best Clients are INFORMED Clients! Online Illustrations!](#)
- [Have You Discovered the Benefits of E-App?](#)



## News Briefs



### Administration

Improved Annuity Application and State Replacement Forms

We are pleased to announce improvements to Annuity Applications used in most states, and State Replacement forms. The new application forms – dated 08-19 – apply to all annuity products. Revised replacement forms – dated 02-20 – are also available now for all applicable annuity sales. [Read More](#)



## Administration

### Forms on iPipeline Not Available Beginning June 30

If you build application packets on the iPipeline platform, EquiTrust forms will no longer be available for downloading and printing. Alternative resources include AppBuilder (print/PDF) on the Agent Website, or E-App (electronic).



## Compliance

### Revised Power of Attorney Certification – ET-POACERT-2500

The improved Power of Attorney Certification ET-POACERT-2500(02-20) is included as an optional form for annuities and life products on AppBuilder and E-App. To view the revised Certification, [click here](#). Either the former or new version will be accepted until May 29, 2020. Beginning June 1, 2020 the new version, dated 02-20, is required. Form changes include:

- A new streamlined format allows for simplified completion
- Additional information for the attorney in-fact certification in Section 3, including the POA agreement date



## Marketing

### Updated EquiTrust Company Resources

Company information reflecting 2019 financial date are revised and available on the Agent Website, including:

- EquiTrust Corporate Brochure – [click here](#)
- Financial Overview – [click here](#)

- Letter of Financial Condition (Producer Use Only) – [click here](#)



## Marketing

### Sales Support Team is At Your Service!

We're here to guide you in the new remote-selling environment. Call our Sales Support representatives to discuss EquiTrust products, marketing resources, and how to properly conduct remote sales. Call 866-598-3694, or send an email to [Sales.Support@EquiTrust.com](mailto:Sales.Support@EquiTrust.com).



## Product Training

### EquiTrust Annuity Product Training – Now on Reg-Ed Platform

Product Training – to be completed before soliciting EquiTrust annuity business – is now hosted on the Reg-Ed training platform. To view the RegEd “User Guide – Annuity Training Platform,” [Click Here](#). For RegEd Technical Support, call 1-800-334-8322, Option 2.

As a reminder, annuity applications received without completed Product Training will not be accepted. If applying for agent contract for annuity products, you must complete Product Training before appointment is final. You may view your training history upon full login to the website (agent number and password required).

**866.598.3694**

**[Agents.EquiTrust.com](http://Agents.EquiTrust.com)**

Products underwritten and issued by EquiTrust Life Insurance Company, West Des Moines, Iowa. Products distributed by EquiTrust Insurance Marketing Services; in California doing business as EQT Insurance Marketing Services.

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