Agent Quick Guide: Digital Policy E-Delivery

REVOL ONE FINANCIAL

With our all-digital, streamlined e-delivery process, policies can be issued within 24 hours* — keeping your business fast, efficient, and client-ready.

Step-by-Step Process

Step 1: Policy Issue

- Once the annuity is issued the policy package, including the Delivery Receipt, is generated and sent to you via DocuSign at the email address you provided in the application.
- This DocuSign link also contains a downloadable version of the policy package.

Step 2: Financial Professional Review

- Click "Review Documents" in the DocuSign email.
- If changes are needed: Decline to sign and contact Agent Care at 1-800-453-4390.
- If everything is correct: Sign the Delivery Receipt.
  - Your signature triggers the generation of a DocuSign email sent to your client(s) requesting them to review and sign the Delivery Receipt.

TIP: The policy is immediately available for download within the DocuSign email. It's also available in the Agent Portal once the Delivery Receipt is fully executed.

Step 3: Client Review

- Client(s) receives the DocuSign email.
- If the client(s) have concerns: They are instructed to contact you or Customer Care.
- If everything is accurate: The client(s) sign the Delivery Receipt.
  - **Important:** Jointly Owned policies require signatures from both owners before execution is complete.

Step 4: Completion

- Once all signatures are received:
  - Both parties receive the final policy package via email link.
  - The policy becomes available in the Agent Portal.
  - The client receives a welcome email with an invitation to sign up on the Client Portal, where the client will be able to view the policy package.

Best Practices

After your review, immediately schedule a Policy Delivery Meeting with your client(s). During the meeting, review the policy together to answer any questions. Ask the client to open their DocuSign email and review the policy package and the Delivery Receipt with you

*Assumes all required signatures are received and documentation is in good order. New cases received before 3:00 pm CT will be reviewed, and any requirements will be communicated in real time via the agent portal on the same day the application is received.

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Need Support?
Agent Care is here to help: 1-800-453-4390

Frequently Asked Questions (FAQs)

Q: Where can I access the policy package?

A: Immediately within the DocuSign email or via the Agent Portal after the Delivery Receipt is fully executed.

Q: Can I fix errors after receiving the policy package and before it is signed?

A: Yes. “Decline” to sign in DocuSign and contact Agent Care immediately.

Q: Is this process secure?

A: Absolutely. DocuSign is an industry-standard, secure e-signature platform.

Q: How long does the process take?

A: Once the policy is issued, each step happens almost instantly in sequence. As soon as the Financial Professional signs the DocuSign Delivery Receipt, the client typically receives their own DocuSign email within moments—keeping the process fast and seamless.

Q: I didn’t receive the DocuSign email. What do I do?

A: Check your Spam/Junk folder. Search your mailbox by the full policy number.
Still missing? Contact Agent Care.

Q: How long is the DocuSign link valid?

A: The original link is valid for one week. If the week has passed, click on it and you’ll have the option to click on “Send new link”. A new link will arrive in your inbox moments after clicking on “Send new link”.