## **AboutMe Online Health History**

A life insurance underwriting tool<sup>1</sup>



Pacific Life Insurance Company

When applying for life insurance in this digital age, many of today's clients would welcome an online method for gathering health history on their own time.

The AboutMe Online Health History Tool—available with drop tickets on <u>Pacific Accelerated Life+ (PAL+) streamlined underwriting</u>—is an all-digital alternative to the phone interview.

#### How It Works in 4 Easy Steps



### Welcome Email

When the application is received, your clients will get a welcome email from Pacific Life inviting them to begin the AboutMe online health history questionnaire.

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# Secure Online Portal

All information is stored securely and privately as the client completes it. 3

### **Automatic Reminders**

Automatic reminders are emailed to the client to complete their questionnaire, plus you'll receive status updates along the way.



### Follow-Up

If the client does not complete and e-Sign the questionnaire, a follow-up phone interview is scheduled to help keep the application moving smoothly.



**Convenient** Complete questionnaire on any device (smart phone, laptop, or computer) at client's convenience. No managing scheduling conflicts or tracking down missing forms or signatures.



**Contactless** Digital, end-to-end process with automated reminders throughout and DocuSign® for electronic signatures.



**Confidential** Secure online portal stores information as they go so clients can complete their health history when it's most convenient for them.

### Help your client prepare!

Share the **What Happens Next** flyer with your client to help them gather all the necessary medical documentation they may need.

<sup>1</sup> Product availability: Pacific Life Insurance Company's PL Promise Term (Policy Form #P16LYT or ICC16 P16LYT and S16LYT 10, S16LYT 15, S16LYT 20, S16LYT 25, or S16LYT 30, and PL PROMISE GUL No-Lapse Guarantee Universal Life Insurance (Policy Form #P18PRUL and S18PRUL or ICC18 P18PRUL and ICC18 S18PRUL, based on state of policy issue. AboutMe Online Health History is available with PAL+ drop tickets. Requires a unique email address for each insured.

The primary purpose of life insurance is to protect the policy beneficiaries from the adverse financial consequences of the insured's death.

Pacific Life is a product provider. It is not a fiduciary and therefore does not give advice or make recommendations regarding insurance or investment products.



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Pacific Life Insurance Company is licensed to issue insurance products in all states except New York. Product/material availability and features may vary by state.

Life insurance is subject to underwriting and approval of the application and may incur monthly policy charges.

The home office for Pacific Life Insurance Company is located in Omaha, Nebraska.

Investment and Insurance Products: Not a Deposit	Not Insured by any Federal Government Agency	
Not FDIC Insured	No Bank Guarantee	May Lose Value