Security National
Life Insurance Company

TELESALES TRAINING 2020

Simple Security Plan

SIMPLE SECURITY PLAN TELE-SALES TRAINING

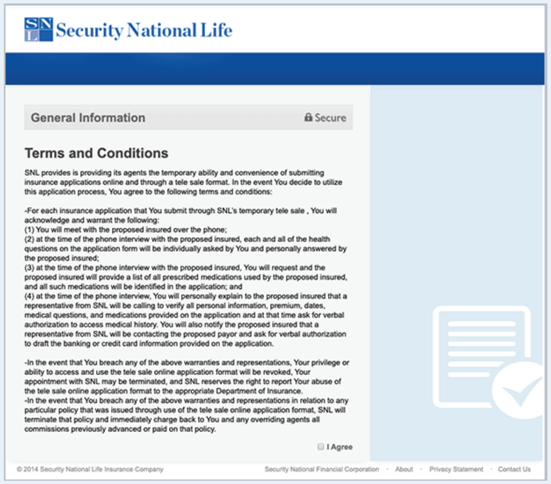
In an effort to help provide alternative sales methods and processes during these unprecedented times, Security National would like to introduce a Tele-Sales format. Our hope is that this format will allow our valued agents to work from the safety of their home and continue providing final expense insurance to those in need. Below are simple steps to follow in order to complete our process.

STEP 1: PREP FOR MEETING WITH INSURED

1. Agent will hold a telephone or video conference appointment with proposed insured.

2. Agent will access the Tele-sale application by logging into their agent portal. Click on "New Business" then click on "Tele-Sales Application."

STEP 2: SUBMIT TELE-SALES APPLICATION



1. Complete the personal information for the proposed insured including height and weight.
2. Ask the proposed insured all health questions and properly record the answer.
3. Input all prescription medications taken by the insured, including reason for taking, dosage amount, duration and number of times taken daily.
4. Complete banking information for the designated payor.
5. Designate billing options and dates.
6. Agree to the agent statement.
7. Sign the agent portion of the app by typing your name.
8. Complete the application by clicking "Submit."
   The program will then verify what plan the proposed insured is applying for, reviewing the coverage amount, premium and billing options. At this point you can modify the face amount, if needed.
9. Click "Accept" once you are ready to finalize the application.

STEP 3: INFORM INSURED ON NEXT STEPS

Agent should inform the proposed insured and the designated payor that they will be receiving a phone call from an SNL representative to verify the proposed insureds personal information and ask for verbal authorization to run medical and prescription history. Representative will also ask for authorization from the designated payor to draft the listed account if the bank draft option was selected.

Helpful Tip! Our representatives will be calling from an 801 area code. Please mention this to the families you're working with!

PROPOSED INSURED

As part of the verification process SNL representative will ask for the proposed insured to verify their full name, address, date of birth, last 4 digit of their social security number and height and weight. The representative will then verify coverage amount, premium and bill/draft date.

DESIGNATED PAYOR

SNL representative will ask the designated payor to confirm the account number, routing number and bank name when the bank draft option has been selected. If the credit card option has been selected the SNL representative will verify card number, expiration date and CVV.

FINAL STEP: APPLICATION PROCESSING

After verbal verification and authorizations have been received by the SNL representative the application will then be given to the underwriting team for risk assessment and activation.