

Resource guide for our digital capabilities

Helping your clients understand what they can do online.

Electronic Personal History Interview (ePHI)

Your client has the option to complete their personal history interview online via questionnaire.

Eligibility:

- Available in all states where Allianz Life Pro+® Advantage Fixed Index Universal Life Insurance Policy is sold.
- Available for all applicants regardless of age, policy type and face amount, etc.
- ePHI is currently available only in English.
- The ePHI is compatible with cell phone, tablet, laptop, and desktop computers.

How to prep your clients:

- Please provide your client our Underwriting Made Easy flier (CSI-448).
- For the average applicant, the ePHI takes approximately 10-15 minutes.
- Clients will need a valid email address and access to a phone to receive verification information.

What your clients can expect:

- Your client should receive an email with the ePHI link from Allianz within the next business day of the application being submitted.
- The link will be active for 30 calendar days.
- A reminder will be sent every 5 days, until the link expires.
- Clients will be able to start, stop, and restart their ePHI.

In the event of lost, never received, or expired links:

- Have your client check their spam folder or junk folder first.
- If not found, please reach out to your case manager for assistance, or have your client request help via the Allianz ePHI Help Line, 866-286-3236.
- Please note that only the Home Office can resend emails with ePHI links to your client.

If your clients want to change from tele-PHI to ePHI (or vice versa):

- If switching from tele-PHI to ePHI, please reach out to your case manager for assistance, or have your client make the request when the tele-PHI interviewer contacts them. Your client can also call the Allianz ePHI Help Line for help at 866-286-3236.
- If switching from ePHI to tele-PHI, it normally takes 2 business days to get a call from the tele-PHI interviewer.

E-signature

Enables clients and financial professionals to review and sign policy documents online via the website.

Eligibility:

Any client (and client's financial professional) who meets the following criteria:

- is the owner and insured on the policy
- is an individual (a trust or corporation would not be eligible)
- is the single owner on the policy (not joint owned)

How to prep your clients:

Please provide your client our Online Capabilities flier (CSI-555).

Manage Your Premium Payments (online EFT)

Clients have the ability to set up and manage their life insurance premium payments for initial and inforce premiums online via the Allianz website.

Eligibility:

- Any client who:
 - is both the owner and payor on the policy
 - is an individual (a trust or corporation would not be eligible)
 - is the single owner on the policy (not joint owned)
- If the payor is not the owner of the policy, but meets the other criteria, the payor can set up or change the EFT by calling the Allianz Contact Center at 800-950-1962.

How to prep your clients:

Please provide your client our Online Capabilities flier (CSI-555).

Processing time for online EFT requests:

- For initial premium payments (pending business), the first draft will take place when delivery requirements are received and resolved. Subsequent premium payments will align with the date and frequency elected in the online EFT form.
- For inforce business, allow 10 calendar days for processing. If the change request is submitted within 10 calendar days, the update may not be effective until the next scheduled payment period.



Regardless of how your client's information is being gathered, our priority is keeping their information secure and confidential. **For additional help, please contact your Allianz® representative.**

Product and feature availability may vary by state and broker/dealer.

This content does not apply in the state of New York.

Guarantees are backed by the financial strength and claims-paying ability of Allianz Life Insurance Company of North America.

Products are issued by Allianz Life Insurance Company of North America, 5701 Golden Hills Drive, Minneapolis, MN 55416-1297. 800.950.1962.
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