



Getting Started Guide

Electronic Policy Delivery

Protective's Electronic Policy Delivery (EPD) option allows you to deliver customers' policies with a secure website.

Here's how it works:



Once the policy is approved and issued, you'll receive an email from epdagent@protective.com with instructions on how to review and approve the policy on our secure website (myprotective.com).
Upon your release, the customer will receive an email from epdcustomer@protective.com including a link to our customer website (myaccount.protective.com).



After following the online registration instructions, the customer will be asked to review and electronically sign any applicable policy documents.



If needed, the customer will also have the ability to make their first premium payment online.



The customer will need to complete the electronic delivery process within 30 business days, or the policy will revert to paper delivery and will be mailed to your office.

Tracking your electronic policy deliveries

Financial professionals can track the status of their electronic policy deliveries by selecting the "Electronic Policies" link under the "My Business" option on myprotective.com. Once the policy is placed in force, a copy of the policy and delivery requirements will be available to review or download for 20 days.

Additional information on next page.

For Financial Professional Use Only. Not for Use With Consumers.

Tips for success

- Add epdagent@protective.com to your email address book to ensure you receive EPD notifications.
- Tell customers what to expect from the EPD process by providing them with a copy of our step-by-step guide to Electronic Policy Delivery.

EPD is not available when:

- The application is for a Variable Universal Life product
- The application involves a 1035 exchange or internal replacement
- The policy owner and payor are not the same
- The policy is owned by a trust
- We do not have a valid email address for financial professionals or customers



Eliminate the hassle of paper policy delivery with EPD today.

Questions? Contact our sales desk at 877-778-3500, option 1 for additional information or assistance.

Protective and Protective Life refer to Protective Life Insurance Company (PLIC) and its affiliates, including Protective Life and Annuity Insurance Company (PLAIC). Protective Life Insurance Company is located in Nashville, TN and Protective Life and Annuity Insurance is located in Birmingham, AL. Policy form numbers, product features and availability may vary by state.

Protective and Protective Life are registered trademarks of Protective Life Insurance Company.

The Protective trademarks, logos and service marks are property of Protective Life Corporation and are protected by copyright, trademark, and/or other proprietary rights and laws.

CLA.2661347 (09.21)

protective.com

For Financial Professional Use Only. Not for Use With Consumers.

Not FDIC/NCUA Insured	Not Bank or Credit Union Guaranteed	Not a Deposit
Not Insured By Any Federal Government Agency		May Lose Value