New Business Bulletin

LIFE INSURANCE

.017

JULY 2024



Connext enhancement: Direct links to required form PDFs

A recent Connext update provides users with direct links to forms within the outstanding requirements section of a new business policy detail. This is a change from the current practice which required users to perform a separate search within Forms Depot to find the form.

When a form is required, a link will be found within the detail section of the associated requirement within the Outstanding Requirements section of the policy. The link will open the required form as a PDF allowing the user to either:

- · Save the form to their computer as a PDF
- Print the form
- Forward the PDF via email

Please note

- Forms that are specific to individual products such as IUL Supplemental Applications and require additional criteria other than product type will not be linked.
- Additional notes about the forms that reside in Forms Depot will not be added to Connext.

Have questions? Talk to your dedicated Case Relationship Manager.

See page 2 for screen shots

Policies issued by American General Life Insurance Company (AGL), Houston, TX except in New York, where issued by The United States Life Insurance Company in the City of New York (US Life). AGL does not solicit, issue or deliver policies or contracts in the state of New York. Guarantees are backed by the claims-paying ability of the issuing insurance company and each company is responsible for the financial obligations of its products. Products may not be available in all states and features may vary by state.

All companies above are wholly owned subsidiaries of Corebridge Financial, Inc. Corebridge Financial and Corebridge are marketing names used by these companies.

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. For legalgectofulting or tax advice consult the appropriate professional. © Corebridge Financial, Inc. All rights reserved.

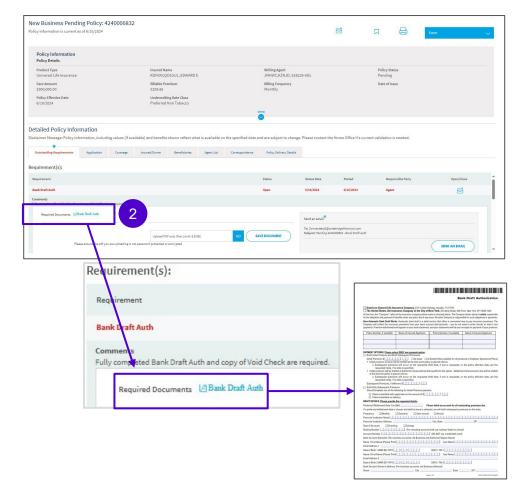
Connext enhancement: Direct links to required form PDFs

Pending
 requirements will
 appear in red text
 in Requirement(s)
 section.
 Click on the blue
 envelope to open
 the requirement
 details.

Requirement(s):					
Requirement	Status	Status Date	Posted	Responsible Party	Open/Close
Amount of Coverage / Benefit omitted Comments Exch/Repl - sequence #1 - ZACHARY TAYLOR LIFE	Open	5/31/2023	5/31/2023	Agent	1 🖻
Motor Vehicle Report Comments	Ordered	5/31/2023	5/31/2023	Home Office	Ħ
Agent Report	Reviewed	5/31/2023	5/31/2023	Agent	~
HIPAA Auth	Reviewed	5/31/2023	5/31/2023	Agent	~

 The form link will be the form description in blue text. Click on blue text.

This will open a PDF of the form in a separate tab. Download the form PDF and complete it as required.



- The process for uploading completed forms has not changed:
 - Click Go.
 - Browse your computer for the saved/completed signed form and add it.
 - Click Save Document.
 - The Form's Name will display; if the completed/signed form's name was change, the new name will display.

