Live App™
Advisor Info Sheet

STEP ONE: Advisor must have final sales discussion with client to secure what product has been sold

- Advisor must be currently licensed in the state in which they are soliciting the Disability Insurance to the Client
- Advise client of what to expect in Live App process
- Give the Live App Client Info Sheet to the client
- Complete the Live App Appointment Request Form with the client
- Inform the client that the Live App Operator will call at requested date and time to complete full application

STEP TWO: Advisor must submit COMPLETED Live App Appointment Request Form to DRG Live App Operator via email to **liveapp@drgdi.com** or by fax at **773-725-7828.**

- Live App process will not be initiated with client until the completed Appointment Request form is received
- Advisor must attach a copy of the sold proposal

STEP THREE: Once online application is completed and signed by client, documents will be forwarded to agent for signature

- Advisor must check their email for notification of client completed documents
- Advisor must promptly sign their portion of documents and email or fax them back to the Live App Operator

*****After all three steps have been completed; application will be received by DRG for final review for carrier submission. *****