

EZLIFESALES

Making **Life** EasierSM

What Diligent Follow-Up Means

During the first 10 days we make 14 attempts to complete the application and order and schedule the medical exam for your client.

Day 1 (first 24 hours)	<ul style="list-style-type: none">• 1st call to client at requested time (phone message left if needed)• 2nd call to client (no message)• 3rd call to client (no message)	Day 4	<ul style="list-style-type: none">• 7th call to client• 2nd email to client
Day 2	<ul style="list-style-type: none">• 4th call to client (2nd phone message)• 5th call to client (no message)	Day 5	<ul style="list-style-type: none">• 8th call to client• 1st call to agent asking for assistance• 1st email to agent asking for assistance
Day 3	<ul style="list-style-type: none">• 6th call to client• 1st email to client	Day 10	<ul style="list-style-type: none">• 9th call to client• 2nd email to agent closing case• (We are happy to re-open the case at any time!)

Once we complete the application we will follow-up directly with the client for additional items. You will receive a notification regarding your case a minimum of:

- **Once every 5 business days**
 - **Whenever the case is touched**
 - **When there is a change in status**
- and

Feel free to check your case status anytime online!

Just go to:

www.pinneyinsurance.com/casestatus