

# quikMet

MetLife electronic transmittal



# MetLife

## Four 'quik' steps to boost your sales

### Step 1 Run the Proposal

Issued Name	Date of Birth	Issue Age	Gender	Risk Classification	Premium Mode
Valued Client	9/28/1961	45	Male	Preferred Plus NonSmoker	Annual

  

Product	Base Face	Base Premium	Total Annual Premium
GLT-10	\$300,000	\$312.00	\$312.00
GLT-15	\$300,000	\$411.00	\$411.00
GLT-20	\$300,000	\$510.00	\$510.00
GLT-30	\$300,000	\$732.00	\$732.00

### Step 2 Complete an Order Ticket

Proposed Insured Information

First Name:

Middle Initial:

Last Name:

Gender:  Male  Female

Date of Birth:  /  /

Does the Proposed Insured have a Social Security Number?  No  Yes

Social Security Number:  -  -

Contact Phone:  (  )  -  Ext.

Contact Time From:  (choose one)

Contact Time To:  (choose one)

Preferred Language:  English

Will the policy Owner be different than the Proposed Insured?  Yes  No

Is the Proposed Owner a member of the military services or a dependent of a member of military services? "Member of the military" includes persons in any of the 5 branches of the U.S. Armed Forces or in the Reserves or in the

Yes  No

### Step 3 Print Forms

Forms Summary Page - Microsoft Internet Explorer

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Form Summary for 078 QM140455

For the sale of the product, you are required to provide these forms to your client. They have been selected per the information that you have provided in the data collection portion of your quikMet Order Ticket. After printing these forms, please continue to the next steps to submit your Order Ticket. If you encounter any problems printing these forms, please save this order ticket and try again later.

**Sign & Fax**  
The signed forms need to be immediately faxed to us for processing along with this Order Ticket. (Fax information provided on the Representative Checklist)  
[View Signature Authorization](#)  
[Auth/Sign/Doc](#)  
[HV Test Informed Consent Form/Enterprise](#)

**Print & Keep**  
Please print these forms and give them to your client along with this order ticket.  
[Military Disclosure](#)  
[View To Export](#)  
[Tracking Letter Behind](#)  
[Buyer's Guide](#)  
[Consumer Privacy Notice](#)

**Export All to PDF**

Cancel Save Previous Next

Fields denoted with an \* are required.

### Step 4 Certify and Submit

Questionnaire - New Questionnaire Page - Microsoft Internet Explorer

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Order Ticket#: QM140455

Fields denoted with an \* are required.

For \* questions, your selection indicates the next question.

To go back, click on the Previous button.

To save, click on the Save button.

To exit Order Ticket, click on the Cancel button. Information on current page will not be saved.

Representative Certification (Valued Client)

Is this a replacement?  No

Did you use only written sales materials approved for use by the appropriate Company?  Yes  No

Have you given the proposed Insured(s) the Consumer Privacy Notice: The What to Expect Letter and, as required, the Life Insurance Buyer's Guide?  Yes  No

Relationship to Proposed Insured(s)  Not related  Relative by blood or marriage

I certify that, to the best of my knowledge, the identification information provided by the Owner either in person, by mail, or phone is accurate. Plus an Equifax check will need to be done on all submissions.

Name of Representative: SEAN SAVAGE

I acknowledge that this represents a signature, and I certify that all of the above statements to be  Yes  No

continued

#### What You Do:

1. Log in to [www.metlifeinvestors.com](http://www.metlifeinvestors.com).
2. On the Portal, click on the quikMet button at the bottom of the screen. This will bring you to the quikMet Welcome Page. To begin the process, click quikMet Proposal on the left.
3. Fill in appropriate data on your client and the type of coverage requested.
4. After your client has viewed and accepted the proposal, click on Launch quikMet. All information entered in the proposal will pre-fill the order ticket.
5. quikMet will electronically determine which forms are needed for your state and provide them to you in one consolidated PDF for easier printing. In some cases, your ticket may qualify for MetLife's Electronic Consent (eConsent) process, where your client may elect to receive an e-mail with all applicable forms and disclosures.
6. Your Order Ticket is submitted in real time to our Client Acquisition Team for immediate servicing.
7. Prepare your client for the telephone interview and the para-medical examination. In some cases, a para-medical examination is not required.
8. Deliver your client the Policy Packet.
9. Return outstanding Delivery Requirements to MetLife.

#### What We Do:

1. Case manage each submission
2. Order parameds, if needed
3. Perform a tele-application interview
4. Fully underwrite each case



**Our life insurance sales desk is available to answer your questions or assist you in using the quikMet process.**

Life insurance products are issued by MetLife Investors USA Insurance Company, Irvine, CA 92614, Metropolitan Life Insurance Company, New York, NY 10166, and in New York only by First MetLife Investors Insurance Company, New York, NY 10166. All guarantees are subject to the claims-paying ability and financial strength of the issuing insurance company. Variable products are distributed by MetLife Investors Distribution Company, Irvine, CA 92614. All are MetLife companies. September 2011

#### Life Insurance Products:

- Not A Deposit • Not FDIC-Insured • Not Insured By Any Federal Government Agency
- Not Guaranteed By Any Bank Or Credit Union • May Go Down In Value

# MetLife

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