



Learning  
Academy

Presents

# Foresters Biz App

Foresters Financial<sup>TM</sup>  
mobile app for agents

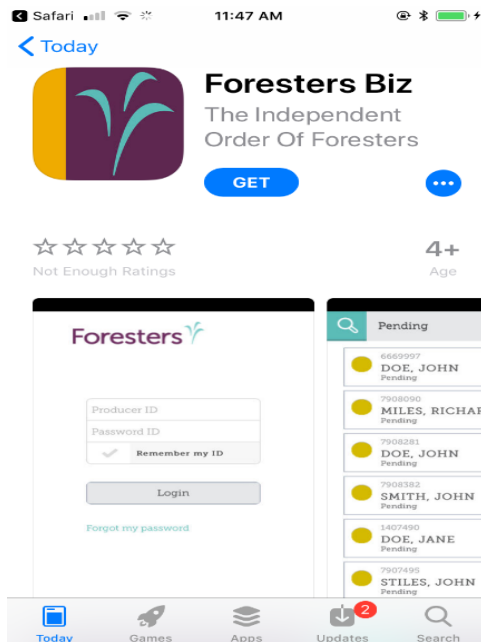


The information contained in the Biz App and Certificate Details page can only be used to service Foresters certificates. The information cannot be used for any other purpose. Please remember to safeguard your password and any information retrieved from ezbiz or the Biz App.

For producer use only. Not for use with the public.  
504436 US (03/18)

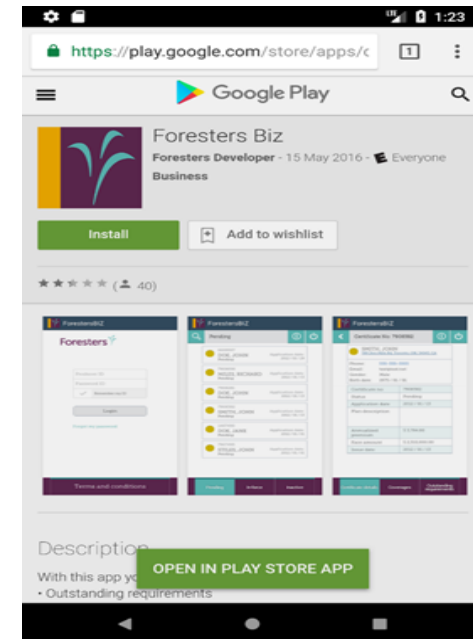
– How to install Foresters mobile application on an iPhone

- Under the search tab, type in Foresters Biz
- Once result show, select "Get"
- Enter your *Apple username* and *password* to start the download



– How to install Foresters mobile application on an Android

- Under the search tab, type in Foresters Biz
- Once result show, select "Install"
- Enter your *Google Play username* and *password* to start the download

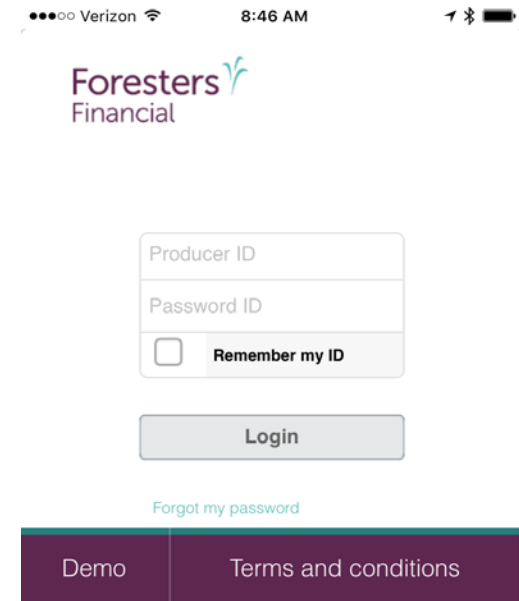


– After the app launches, agents have the ability to:

- Login using the same credentials as ezbiz
  - Producer ID is your producer #
  - Note: If you forgot your password, utilize *forgot password* to have a temporary password e-mailed, which also resets your ezbiz password
- Access a Demo
  - Provides an agent the ability to view what will be available within the app
- Access the terms and conditions
  - Provides a list of Foresters general disclaimers and terms of use for the app

– Once logged in, agents have two options available:

- Agents can select either:
  - Certificate Details
  - Mobile Quotes



Verizon 8:46 AM

Foresters Financial

Producer ID

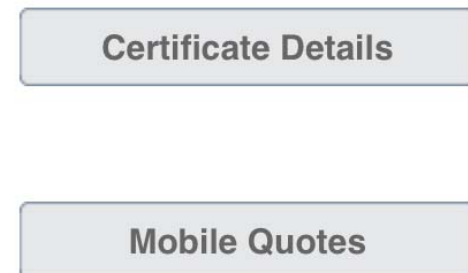
Password ID

☐ Remember my ID

Login

[Forgot my password](#)

Demo Terms and conditions



Certificate Details

Mobile Quotes

## – What is available within Certificate Details?

- Agents have the ability to view business by:

### – Pending Business

Pending	
8976600 <b>ABC000 TEST000</b> Pending	Application date: 2016 / 11 / 09
8976400 <b>ABC001 TEST001</b> First Premium Pending	Application date: 2016 / 09 / 01
8976401 <b>ABC002 TEST002</b> First Premium Pending	Application date: 2016 / 09 / 01
8976394 <b>Alfax1 Lasax1</b> Pending	Application date: 2016 / 09 / 01
8976380 <b>PDF0003 CASE0003</b> Issued	Application date: 2016 / 08 / 31
8976372 <b>PDF05 TEST05</b> Pending	Application date: 2016 / 08 / 30
8976392 <b>PDF0004 TEST004</b> Pending	Application date: 2016 / 08 / 30

### – In-force Business

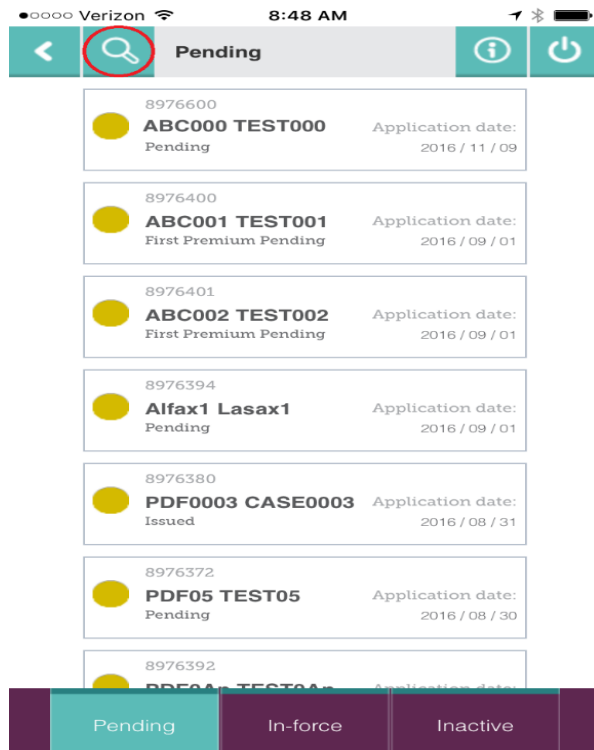
In-force	
8976405 <b>ABC008 TEST008</b> Active	Issue date: 2016 / 09 / 28
8787637 <b>Sandra Potenza</b> Active	Issue date: 2016 / 09 / 01
8879976 <b>Sandra Potenza</b> Active	Issue date: 2016 / 09 / 01
8879987 <b>Sandra Potenza</b> Active	Issue date: 2016 / 08 / 28
8874989 <b>Sandra Potenza</b> Active	Issue date: 2016 / 08 / 28
8876543 <b>Sandra Potenza</b> Active	Issue date: 2016 / 08 / 28
8734132 <b>Test000 PDF000</b> Active	Issue date: 2016 / 08 / 28

### – Inactive Business

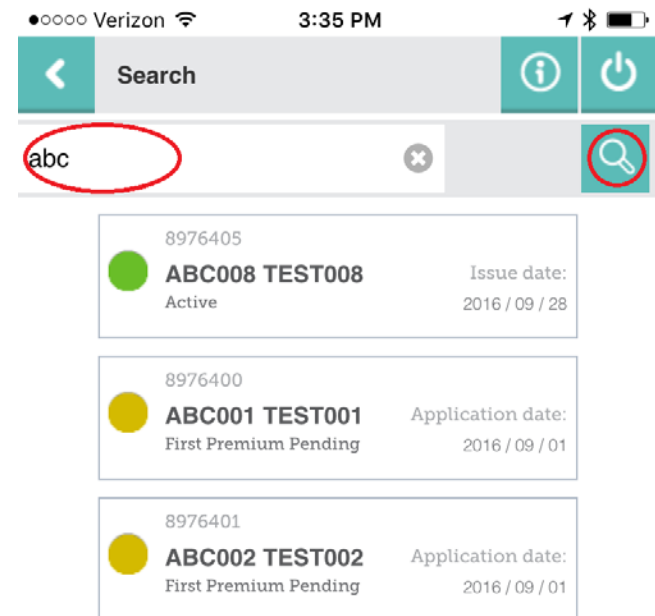
Inactive	
8976377 <b>PDF0002 CASE0002</b> Not Proceeded With	Application date: 2016 / 08 / 31
8976389 <b>PDF000B CASE000B</b> Not Proceeded With	Application date: 2016 / 08 / 31
8976390 <b>PDF000c CASE000c</b> Not Proceeded With	Application date: 2016 / 08 / 31
8976370 <b>PDF03 TEST03</b> Not Proceeded With	Application date: 2016 / 08 / 30
8976371 <b>PDF04 TEST04</b> Declined	Application date: 2016 / 08 / 30
8734387 <b>Yang Boxuan</b> Not Proceeded With	Application date: 2016 / 08 / 29
8976367 <b>Test000 PDF000</b> Not Proceeded With	Application date: 2016 / 08 / 29

## – What is available within Certificate Details?

- Agents have the ability to view business by:
  - The search feature
    - » Select the search button at the top of the app

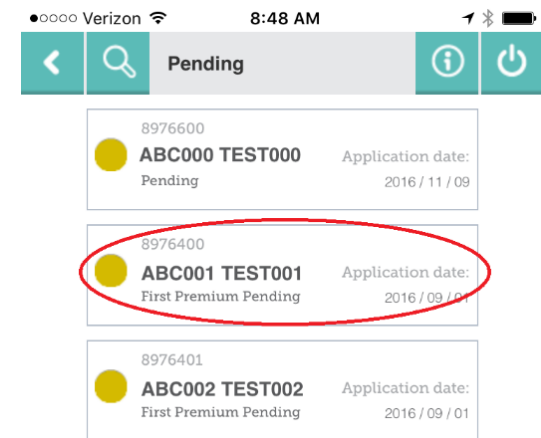


- » Enter either an insured's name or certificate number and select search



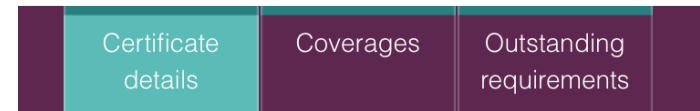
– What is available within Certificate Details?

- How to launch a certificate:
  - Once the appropriate certificate is identified, simply click within that certificate box to open
- Can I view the same certificate information on the app that is available on the producer website?
  - No, the app is more streamlined and meant to provide an "at a glance" view of the certificate



## – What is available within Certificate Details?

- Once a certificate launches:
  - Agents have the ability to view information under three tabs:
    - » Certificate details
    - » Coverages
    - » Outstanding requirements
  - The insured's basic information will always be displayed at the top of each tab:
    - » Name and address
    - » Phone number
    - » E-mail
    - » Gender
    - » Date of Birth



 <b>Alfax1 Lasax1</b> <a href="#">cvvbcv.AR,Alabama,768797,United States of America</a>	
Phone:	<a href="#">456-345-67891</a>
Email:	<a href="#">exampleclient@gmail.com</a>
Gender:	Female
Birth date:	1987 / 10 / 31

– What is available within Certificate Details?

- What is available under the certificate details tab?
  - Basics of the certificate:
    - » Certificate number
    - » Status of the certificate
    - » Type of coverage- product name and type of underwriting
    - » Face amount
    - » Issue and paid to dates
    - » Premium and payment frequency



**Alfax1 Lasax1**  
 cvvbcv.AR,Alabama,768797,United States of America

Phone: [456-345-67891](tel:456-345-67891)  
 Email: [exampleclient@gmail.com](mailto:exampleclient@gmail.com)  
 Gender: Female  
 Birth date: 1987 / 10 / 31

Certificate no	8976394
Status	Pending
Application date	2016 / 09 / 01
Plan description	UL Underwritten – GPT
Face amount	\$197,000.00
Issue date	Not Provided
Paid to date	Not Provided
Modal premium	\$0.00
Premium mode	Annually





– What is available within Certificate Details?

- What is available under the coverages tab?
  - Basics of the coverage:
    - » Product name
    - » Face amount
    - » Issue date
    - » Any riders included with the certificate will be shown here, including the amount of coverage and the issue date

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← Certificate No:8976394 ⓘ ⏻

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[cvvbcv.AR,Alabama,768797,United States of America](#)

Phone: [456-345-67891](#)  
 Email: [exampleclient@gmail.com](#)  
 Gender: Female  
 Birth date: 1987 / 10 / 31

Name	UL Medical
Amount	\$197,000.00
Issue date	2016 / 09 / 13

Name	ABR - Critical Illness
Amount	\$197,000.00
Issue date	2016 / 09 / 13

Name	ABR - Chronic Illness
Amount	\$197,000.00
Issue date	2016 / 09 / 13

Name	Common Carrier Accidental Death Rider
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Certificate details Coverages Outstanding requirements

– What is available within Certificate Details?

- What is available under the outstanding requirement tab?
  - Any outstanding requirements due on the certificate will be shown:
    - » Agents are able to view these requirements on pending business
    - » If no outstanding requirements are due, a message will be displayed stating “No outstanding requirements could be found”

Verizon 8:52 AM

← Certificate No:8976394 ⓘ ⏻

**Alfax1 Lasax1**  
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Phone: [456-345-67891](#)  
 Email: [exampleclient@gmail.com](#)  
 Gender: Female  
 Birth date: 1987 / 10 / 31

Requirement type	Urinalysis
Last modification date	2016 / 09 / 13
Status	Outstanding

Requirement type	Blood Profile Testing
Last modification date	2016 / 09 / 13
Status	Outstanding

Requirement type	Vitals / Physical Measurements
Last modification date	2016 / 09 / 13
Status	Outstanding

Requirement type	Missing Info : Product
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Certificate details

Coverages

Outstanding requirements

– **What is available within Mobile Quotes?**

- Agents have the ability to:
  - Quote all available products for sale
  - Review underwriting guides for field underwriting
  - Utilize needs analysis tools to help determine amount of coverage required
- For Mobile Quotes training, visit the training tab on ezbiz to view the training video

Foresters Financial

MOBILE QUOTES

Advantage Plus

PlanRight

SMART UL

Term

Prepared Accidental Death

RESOURCES

Term, WIL, and UL UW Guide

PlanRight UW Guide

NEEDS ANALYSIS

Mortgage Protection

Lifestyle Protection

Cash Flow

Final Expense

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Version 1.1.00

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# Thank you!

Any questions?



Our Foresters Financial Sales Support team is only a call away, 866-466-7166, option 1 Monday-Friday 8:30am-7pm ET.

If you're looking for a deeper dive on a particular module or additional training needs please let us know at [USLearning@foresters.com](mailto:USLearning@foresters.com)

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