



# NEW AGENT FAQ

## Q: HOW DO I GET THE APPROPRIATE APPLICATION PAPERWORK TO WRITE A NEW APPLICATION WITH DMI?

A: Once you register for *MyBackOffice* account, click on “My Tools -> Forms” and select the carrier and product you plan to sell. From there, forms can be emailed, downloaded, or printed. Reach out to your Sales VP and request the paperwork needed for the case you plan to write. You can also obtain paperwork from the carrier websites, or through our advisor portal, *MyBackOffice* at [mybackoffice.dmi.com](http://mybackoffice.dmi.com).

## Q: WHAT IF I WANT TO TAKE AN E-APP?

A: E-app platforms differ by carrier, but most are accessible from the carrier websites or *MyBackOffice*.

If you are planning to write an annuity, most e-apps can be accessed through DMI’s Firelight platform on My Back Office. If you haven’t already registered for an account, navigate to the e-app page and click “Request Access to Firelight”. Your account will be set up and you will receive an email from them stating your account has been created. From there you can finish the setup process and begin the e-app process.

If you are writing life insurance you can use the iGo e-app platform by iPipeline, accessible through *MyBackOffice* at [mybackoffice.dmi.com](http://mybackoffice.dmi.com). Through this system you can submit applications for a wide variety of carriers and products all in one place.

## Q: I HAVE WRITTEN A PAPER APPLICATION; HOW DO I SUBMIT?

A: Applications can be sent via email (in most cases) to [newbusiness@dmicom](mailto:newbusiness@dmicom) or by Secure Upload on MyBackOffice. Other options for submitting paperwork to DMI can be found on our Submission Guidelines document. Once received, your dedicated case manager will review paperwork and sent to the carrier for processing. If anything is missing or needs to be corrected on the paperwork, your case manager will advise you within 1 business day. If you are writing business with a carrier that requires original application paperwork or if transfer/1035 exchange paperwork needs to be an original (wet-signed) document, overnight mail it to us.

## Q: I SUBMITTED AN APPLICATION, WHO DO I CONTACT AT DMI WHEN I WANT AN UPDATE ON MY PENDING LIFE INSURANCE OR ANNUITY APPLICATION?

A: You can access pending case information and requirements 24/7 by navigating to the pending cases section of My Back Office. If you need more details, please contact your case manager and they will be able to assist. They are regularly in touch with the carriers getting updates on your cases and ensuring that things are being processed promptly. You will be receiving regular updates from your case manager on the progress of your case as it is being processed.

## Q: WHO DO I CONTACT AT DMI WHEN I WANT ASSISTANCE CHOOSING A PRODUCT FOR MY CLIENT?

A: Please contact your Sales VP, and they can go over options and make recommendations based on your clients’ needs.

## Q: WHO DO I CONTACT AT DMI WHEN I HAVE QUESTIONS REGARDING ANNUITY SUITABILITY?

A: If you would like to discuss matters related to the suitability of an annuity product, you can contact your Sales VP. You are ultimately responsible for determining whether a product is suitable for your client, but we can offer advice based on our experience with carrier requirements.

## Q: IF I NEED TO TAKE ANNUITY PRODUCT TRAINING PRIOR TO TAKING AN APPLICATION, WHERE DO I DO THAT?

A: These materials can be found by visiting [mybackoffice.dmi.com](http://mybackoffice.dmi.com) and select “My Contracting ->Carrier Product Training.”