






# 2009 Sprint to the Finish with Prudential

## YEAR END DEADLINE

**12/22/2009:** All Delivery Requirements (In Good Order), including the premium, must be received by Prudential no later than 12/22/2009 in order to receive compensation in 2009.

## KEY REMINDERS FOR A WINNING YEAR END

-  **Identify Critical Cases:** Provide a list of critical cases to your dedicated Prudential Account Representative.
-  **Help Us Prioritize Your Informal Cases:** Work through your Regional Vice President to escalate critical inquiries with a strong possibility of turning into a case for year end.
-  **Make The Subject Line of Emails Clear:** Include “YE” or “Year End” in the subject line of emails, along with the policy number.
-  **Utilize Case Status Tools**
  - ▶ Determine if additional requirements are needed for the case to be placed in force.
    - ❖ Check Status: Key status tools include Proactive case status emails, your Agency Management System and [www.pruxpress.com](http://www.pruxpress.com)
    - ❖ Expedite Handling: Image or fax requirements, and use Two-Way Communication (via [www.pruxpress.com](http://www.pruxpress.com), Quickview, Smart Office or Agency Works) to EXPEDITE and SIMPLIFY requirement submission.
-  **Be Proactive**
  - ▶ Scrub delivery requirements and proactively obtain missing information.
  - ▶ Follow cases through to confirm placement via status tools.

### Delivery Requirements Key Tips & Commonly Missed Requirements

#### Cover Letter & Mode Changes

- Clearly identify mode changes in the cover letter

#### Policy Changes

- Make sure all changes are initialed by the policy owner

#### Delivery Application

- Submit all pages including the Part 2
- Check for the correct Signature and title are on the trust or corporate owned policies,
- Confirm broker’s signature in the Licensed Rep Certification box

#### 10164 Amendment

- Policy Owner’s signature and title

#### Tax Certification

- Title of Owner and Section 1 of the form

#### Policy at a Glance

- Policy Owner’s signature and title, Broker’s Signature and Date

#### E-Pay Forms

- Use our new e-pay form to collect premium at delivery – no check needed to overnight and save time on placement

#### Checks

- Include policy number(s) on checks and clearly indicate if premium is to be split between multiple policies

**Questions? We’re Here To Help!**  
**Contact Your Dedicated Prudential Account Representative**

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