

**Step by Step-Workflow**  
**Specific Solutions- Quick Quote Program**  
**(Cases under \$10,000 in annual premium)**

1. Call (800) 873-2345 or email Specific Solutions at [agency@specificsolutions.com](mailto:agency@specificsolutions.com) .
2. Specific Solutions will need to know:
  - Client Name
  - Age, height and weight
  - Tobacco User
  - Face Amount
  - Medical Impairments
  - Medications and dosage
3. Specific Solutions will send preliminary information to variety of carries to get informal offer within 24-48 hours.
4. Once Specific Solutions has all the informal offers from insurance companies, we send the advisor a synopsis of all the informal offers and tentative requirements (spreadsheet/report).
5. Advisor meets with client to discuss options.
6. Decision by client to apply formally to the chosen insurance carrier.
7. After client decision, advisor calls Marketing Team for Application and required items **(800) 873-2345**.
8. Complete all paperwork sent to you from Specific Solutions.
9. Complete any of your “company’s” required paperwork and new business requirements.
10. Check payable to “**Insurance Company on Application**” if binding coverage, some maybe cashless due to transfers.
11. If no check taken then fax **(716) 632-6051** or email paperwork [agency@specificsolutions.com](mailto:agency@specificsolutions.com) and completed application to Specific Solutions, **if check (binder) taken then 12**. Faxing allows us to begin working on case immediately.
12. Overnight check to:

**Specific Solutions, Inc.**  
**475 International Drive**  
**Williamsville, NY 14221-5772**  
**Attention: Quick Quote Team**
13. Specific Solutions will email copies of case and paperwork to your compliance area.
14. Specific Solutions will ensure that all paperwork is in “good order”, order medicals, APS and any other requirements, if applicable.
15. Specific Solutions will assign case manager to advisor for communications along the way.
16. Policy issued and sent to advisor for delivery to client. Any outstanding delivery receipts, if applicable will be included.