

Guide to Document Requests + Document Processing

Proformex can request policy documents (statements and illustration) from carriers on behalf of the policy agent, the policy owner, or the entity such as trust. To enable this functionality, Proformex must have the following information:

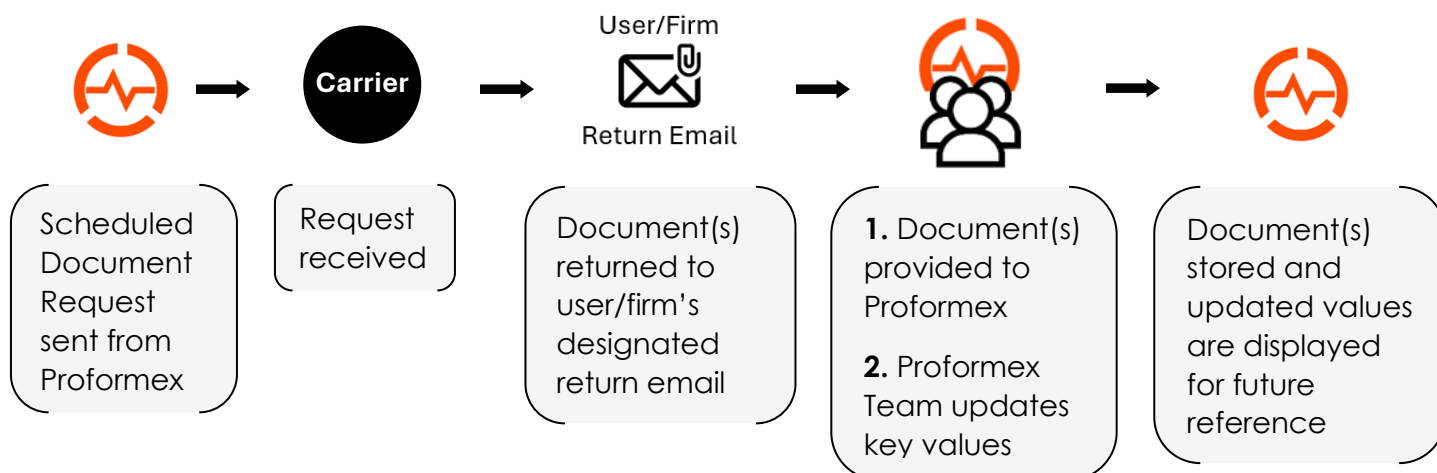
1. **Core Policy Values**
 - Policy Number • Policy Type • Carrier • Policy Status
2. **Names associated with the policy**
 - Insured • Policy Owner • Agent
3. **Authorization Form**
Signed by Authorized Signee (Agent, Policy Owner, or Trustee)
4. **Designated Return Email**
Recommended to setup designated, standalone inbox
(i.e. [policyinfo@\(domain\).com](mailto:policyinfo@(domain).com))

Please contact your Customer Success Manager to confirm that all required information has been collected

Once returned from the carrier, the documents need to be provided to Proformex for Document Processing

- Suggested to auto-forward from the designated, standalone return email to onboarding@proformex.com

Then the Proformex team will update key policy values that have changed based on the documentation.



When are Document Requests sent?

Standard: 5-days post anniversary date

As needed: Dates can be manually changed as desired. If changed, that date will remain in place for future requests, however the year is dynamic.

What is being requested?

Term:

“Please send me the policy's most recent Annual Statement or Verification of Coverage.

Please send the information below if it is NOT available on the Annual Statement or Verification of Coverage: Underwriting class of the insured(s), Term Duration, Policy

Perm:

“An As-Is Inforce Illustration at current % crediting rate paying scheduled premium annually, for all remaining years.

Most Recent Annual Statement”

Can I change the message in the request?

Yes. Please refer to [Are InForce Illustration Requests Customizable?](#)

How can I share documents for Document Processing?

It is recommended to setup a standalone return email for easy auto-forwarding to onboarding@proformex.com.

Documents can also be uploaded manually to Proformex. Please refer to [Upload a Policy Document for Processing](#)

Where can I learn more about Document Requests and Document Processing?

Explore our Help Center! Take a look at the support articles found on this [page](#).

For additional questions, please reach out to your Customer Success Manager.