



TERM CONVERSION PLAYBOOK

Identify available opportunity and learn everything you need to complete the conversion process.



Learn more about our expanded term conversion periods, available UL products and conversion credits...[click here!](#)

IDENTIFY OPPORTUNITY

1. [Term Conversion Overview](#)
2. Contact your BGA or AIG representative for access to your conversion eligible term list
3. Use these [decryption instructions](#) once you receive your eligible term list

MARKET TO ELIGIBLE CLIENTS

BGAs: Use this email to send producers their eligible conversion list:

- [Term Conversion Producer Email](#)

Producers: Use this email to market to your eligible clients:

- [Customer Letter](#)

Note: Age eligibility may differ by product. Questions? Contact (800) 247-8837

CONVERT THE POLICY

- [Term Conversion Process Guide](#)
- [Ownership Change Form](#)
- [Terminal Illness Rider \(TIR\) Instruction Sheet](#)
- [TIR Instruction Sheet for Massachusetts](#)



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