



NATIONAL ASSOCIATION OF INDEPENDENT LIFE BROKERAGE AGENCY

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**NAILBA Releases How-to Guide for Producers, BGA Staff**

(Fairfax, Va.) The National Association of Independent Life Brokerage Agencies (NAILBA) today announced the release of wholesale brokerage's first-ever how-to guide for life insurance agents, Brokerage General Agencies and life carriers—the *Field Underwriting Guide*.

Created by the Training Necessary subcommittee of the Application Pipeline Task Force, the comprehensive *Guide* was designed to be a practical, hands-on resource for producers to put to use as they work through an application, as well as a long-term reference tool on the important steps in the application process.

“The *Field Underwriting Guide* includes a wealth of highly-practical information and easy-to-use forms,” states NAILBA Chairman of the Board Matthew J. McAvoy. “Producers will be able to get into better habits and develop more effective processes for filling out applications right away, which directly impacts the bottom line of agents and brokerage general agencies – through time saved and better placement.”

The *Guide* can be used to highlight key points of the application for faster underwriting, check applications to make sure they are complete, set and manage expectations with the client, ensure the right information is gathered for every case, and educate producers about risk factors and how to optimize the medical assessment process.

In fact, NAILBA estimates that by following these guidelines *placement will increase by 10-20 percent*, resulting in thousands of additional sales dollars.

A customized version of the *Guide* is available to the NAILBA membership for free. Non-members and insurance carriers can contact NAILBA at (703) 383-3081 to learn how to purchase a copy.

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The NAILBA Application Pipeline Task Force (APTF) was created to examine and refine the entire brokerage process (the “pipeline”) where at one end is the agent/customer and at the other end is the carrier. In between are the member agencies of NAILBA. The quest of the APTF is to make that pipeline as trouble-free as possible, with as few holdups, rejections and returns as feasible.

The National Association of Independent Life Brokerage Agencies (NAILBA) is a nonprofit trade association with 351 member agencies in the U.S. and Canada, representing 100,000 producers who deliver more than one billion dollars in first year life insurance premiums annually. NAILBA is dedicated to fostering the growth of its member agencies by providing educational resources, industry standards and a collective voice for legislative and regulatory efforts. Each of NAILBA's members commits to a statement of responsibilities to ethically and responsibly serve their clients' best interests. For more information, visit [www.nailba.org](http://www.nailba.org).