

EQUITRACKER

STATUS DEFINITIONS



In Review for Good Order

Application packet has been received and is being reviewed 1) to ensure paperwork is correct and complete (Florida Accredited Investor Certification, Inherited or Stretch IRA, Entity Certification, Across State Lines sale review, premium exception request, Agent Contracting/Licensing) and 2) for suitability (if an annuity).

OR...

A Not-In-Good-Order (NIGO) requirement has been received and is being reviewed to ensure the case is now in good order.

Not in Good Order (NIGO)

Application was deemed Not-In-Good-Order (NIGO) and awaiting resolution. Action is needed from the agent to provide corrected paperwork or additional information.

Pending Funds

Waiting on funds to be received. If funds are coming from another financial institution, the transfer paperwork has been sent to the other company. If funds are coming from a personal check, we are awaiting receipt of the check.

Pending Issue

All funds have been received and the case is in line for issue.

Complete

Contract/policy has been issued.

Declined

Application has been reviewed and the policy has been declined.