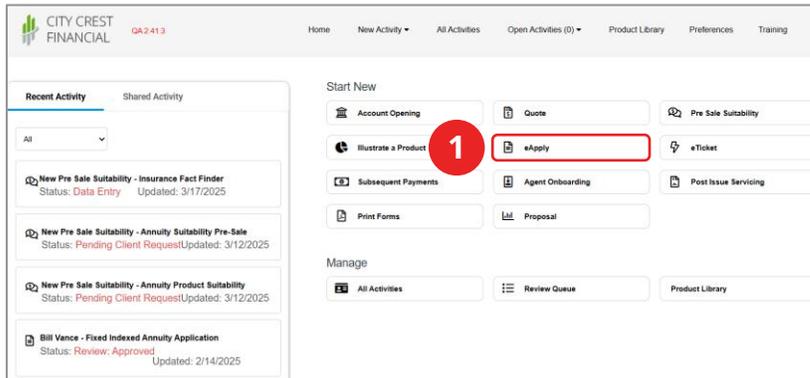


Completing an Application

REFERENCE GUIDE

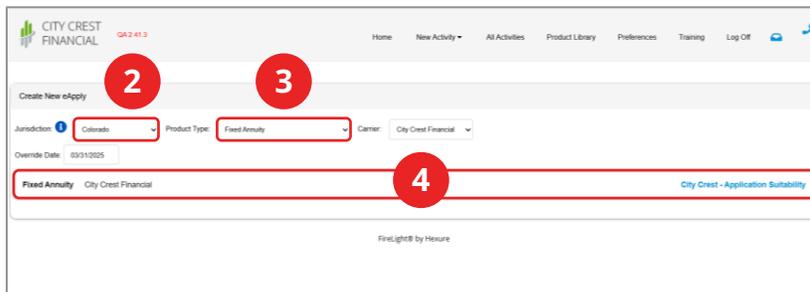
In FireLight, completing an application is easy using eApply. Simply log in with your credentials. Your instance of FireLight may use Single Sign-On or may be embedded in your home system with no additional login at all.



1. EApply

To create a new application, select **eApply**.

Note: You can search for and open an existing application from **Recent Activity** or **All Activities**.

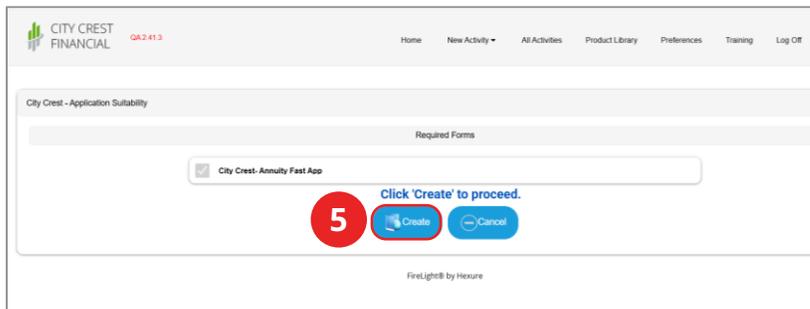


3. Product Type

Select the **Product Type**, for example Life, Annuity, or Fixed Annuity.

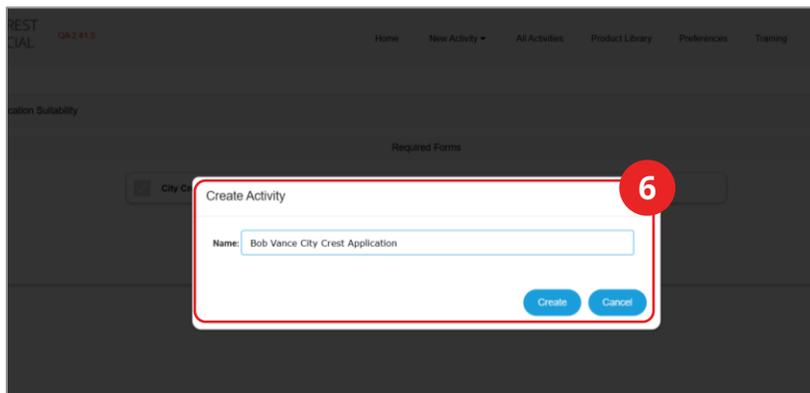
4. Product

Select the **product** for which you want to create an application.



5. Create

Click **Create**.



6. Name

Type in a **name** for the application and click **Create**.

Completing an Application

REFERENCE GUIDE

If your organization uses the Wizard interface, the application will display in a Wizard format, as seen in the screenshots below. If your organization uses Form, then Firelight will display as a Form. By using a Wizard, you and your client can simply fill out the required fields in the application to reduce errors and save time.

CITY CREST FINANCIAL QA 2.41.3 Bob Vance City Crest Application Auto Save Enabled Home Other Actions Open Activities (3) Training Log Off

1 DATA ENTRY 2 SIGNATURES 3 FINALIZE CONTINUE

82%

9

Owner Information

Lookup Owner Information

First Name MI Last Name

Owner Name

Marital Status Date of Birth Owner's Current Age

Gender

8 Next

7. Required Fields

Once you start an application, required fields appear in **Red**.

Note: As you fill in data, enter information accurately. Data entered in one field will be transferred to other fields within the same application.

8. Next

After completing all required fields on one page, scroll down and click **Next**.

9. Status Indicator

As you fill out an application, the **Status Indicator** will display how much of the data entry process remains.

CITY CREST FINANCIAL QA 2.41.3 Bob Vance City Crest Application Auto Save Enabled Home Other Actions Open Activities (3) Training Log Off

1 DATA ENTRY 2 SIGNATURES 3 FINALIZE CONTINUE

100%

You have provided all the required information for this application. You may enter more data or CONTINUE to proceed to electronic signature.

10 CONTINUE

Funding Source

Source of funds used to purchase this product (Check all that apply)

Brokerage Account CD/Savings/Checking Current Income

Inheritance Liquidation of Assets Death Benefit Proceeds

Qualified Plan Distribution Cash Value from Existing Annuity Rollover/Transfer from qualified account

Other Details:

10. Signatures

Once data entry is 100% complete, click **Continue** to advance to the signature process.

CITY CREST FINANCIAL QA 2.41.3 Back to Application

1 DATA ENTRY 2 SIGNATURES 3 FINALIZE

Electronic Signatures

This application will be locked upon maximum number of attempts. No changes can be made after signing.

Use E-Signature Decline E-Signature

If you choose to use E-Signature, all signatures in this application will be collected electronically. Please read the Federal Regulations and Definitions. Please make sure all parties are equipped with these system requirements.

- Internet Access
- Minimum Screen Resolution 1024 x 768
- Web Browser: Firefox (current version), Safari (current version), Google Chrome (current version), Chrome and Safari mobile browsers.
- 128MB of RAM, Cookies and Javascript Enabled.

If you choose to decline E-Signature, all signatures in this application will be collected manually. Your application will be completed in our system. You may print the application PDF files and deliver to your client via postal or other means. Please note that delivery of the information electronically will result in a superior customer experience.

11. Signatures

At the signing ceremony, you can use **E-Signatures** or **Decline E-Signatures**.