

Your team at North American



**Roberto (Rob)
Rodriguez**

National Sales Manager

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**Michael
Dick**

Internal Wholesaler

Direct: **855-841-6304**

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Rob and Michael are **YOUR** dedicated resources with North American. In addition to providing internal support, they can help you identify and prepare life insurance recommendations for your clients and uncover overlooked sales opportunities. Rob and Michael can help you launch your business to new heights! Rob is fluent in both English and Spanish!



Click the icon or
Scan & scroll to
visit **QuickStart**.



Direct access for specific
department needs.

833-757-0223

Press 2, and follow the prompts as listed.

Agent Solutions Option 1

As a secondary resource to Rob, agent solutions is available to help with website and product information, quotes and illustrations, illustration software tips, and more.

Team inbox: SalesSupport@nacolah.com

New Business & Underwriting.....Option 2

Team inbox: PHPLife@sfgmembers.com

Fax number: 855-288-8150

Quick Quotes: quickquotes@sfgmembers.com

Quick Quote Requests can help prepare your agents with reasonable premium expectations. Below are the Quick Quote request qualifications:

- Ages 0-75
- Face amounts up to \$5,000,000
- All products available
- Expected rating class of Table 6 or better
- All narrative underwriting questions
- APS summaries
- Up to 5 pages of medical records

Policy ChangeOption 3

Call for assistant on conversions and internal exchanges.

Team inbox: pchange@sfgmembers.com

Fax number: 855-704-4779

Customer ContactOption 4

Customer Contact can help you with changing beneficiaries, loan and withdrawal availability, policy cancellation, policy values, forms requests, payment modes, in-force illustrations, and policy lapse/grace.

Team inbox: lc@sfgmembers.com

Claims.....Option 5

Call for help filing a death claim or accelerated benefit claims.

Team inbox: claims@sfgmembers.com

New Business Contact Sheet

Your team at North American

Agent Solutions: 833-757-0223 (Option 2) | **Fax:** 855-288-8150 | **Email:** NaNNewBusiness@sfgmembers.com



Amber Steiner

Service Account Manager

- Proactive communication to help avoid delay
- High priority/complex case support
- Assist with advanced markets and large case support

New Business Team

Case Managers

- Provide frontline customer service and relationship management
- New business case follow-up
- Process day-to-day tasks from start to finish

Megan Schulte
Rebecca Romereim
Jolanta Palarz
Crystal Sims

Zack Weiss
Natale Ryan
Brooke Piper

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