

HOW TO DO BUSINESS WITH AMERITAS

Agents have two submission choices when working with Ameritas. You can use OAKTREE Brokerage or Ameritas' direct access option.

OAKTREE Brokerage Service:

Submission:

- All new business applications should be faxed to 800-867-7205, emailed to brokerageservices@otfc.com or mailed to the address below.
- If you do not receive an acknowledgment email within 1 business day, please call for receipt confirmation.
- Your case managers can be reached at 800-842-9124: Wayne ext. 128 Andy ext. 134

Checking Case Status:

- You will receive regular case status emails calls from Brokerage Services.

Requirements and Premium:

- Fax requirements to 800-867-7205 with a cover sheet indicating the client name/policy number.
- Mailing address is:

OAKTREE Brokerage
11166 Fairfax Boulevard, Suite 300
Fairfax, VA 22030
Attn: Brokerage Services

Ameritas' Direct Access:

Submission:

- All new business applications may be uploaded via website directly to Ameritas. Visit Producer Workbench and click on *Gateway Portal* and *Upload Documents*.
- The fastest way to submit an application – Use eApp to upload applications and forms. <https://eappgateway.ameritas.com/eApps/>
- **NOTE:** When you login to eApp use **Eapp2017** as your password or if using eApp for the first time, click *Forgot/Reset Password* to create a password.

Checking Case Status:

- Agents should register online at www.producerworkbench.com then click *Gateway Portal* to track all case status and updates.
- For more questions regarding pending New Business, go to the Gateway Portal and select *Pending New Business*.
- Email: AmeritasNB@DXC.com

Requirements:

- Additional documents and requirements may be uploaded via website directly to Ameritas. Visit Producer Workbench and click on *Gateway Portal* and *Upload Documents*.
- Applications, money and requirements may be mailed directly to Ameritas at:
 - Client Service Office: P.O. Box 305086 Nashville, TN 37230-5086
 - Overnight: 100 Centerview Dr. Ste. 100 Nashville, TN 37214

Contracting:

- OAKTREE uses SURELC for all carrier appointments. Please contact your Life Sales Rep for details.
- For all questions regarding contracting, please contact Ameritas at 800-390-2361, option 5.
- For general questions and to upload contracting forms, visit Producer Workbench and select *Alerts Center*. Click on the *Unread Messages* link to get into the Secure Messaging and then click on the Field Lic/Comp-IDC.
- Fax: 513-595-2800

Commissions

- All questions regarding commissions, please call Ameritas at 800-390-2361, option 6 or email Ameritas at AmeritasAgency@DXC.com

Illustrations and Marketing Support:

- Agents can call 800-390-2361, option 1 or visit Producer Workbench to run illustrations and download sales material.
- Illustration Access Code: **17505**
- Agents contracted directly with OAKTREE Life can call a member of the Sales Support Team at 800-842-9124 ext. 113 or email them at salessupport@otfc.com

Underwriting/Quick Quotes:

- Please call Ameritas at 800-390-2361, option 3 or email at AmeritasUW@DXC.com