

## **HOW TO DO BUSINESS WITH OAKTREE BROKERAGE and John Hancock**

### **Submission:**

- -All new business applications should be faxed to 800-867-7205, emailed to [~brokerageservices@otfc.com](mailto:~brokerageservices@otfc.com) or mailed to the address below.
- Please be sure to send new business application to us using the New Business Transmittal attached. (Be sure to include your email address, this will be how you are notified that the application has been received and given a policy number.)
- If you do not receive an acknowledgment email within 1 business day, please call or email for receipt confirmation.

### **Checking Case Status:**

- Agents should register on the carrier website at [www.jhsalesnet.com](http://www.jhsalesnet.com) for case statuses, however, you will receive regular case status emails from your assigned case manager.
- Please be sure to have the policy number and client name available during all correspondence.

### **Requirements and Monies:**

- Requirements should be faxed to 800-867-7205 with a cover sheet indicating the client name and policy number.
- Please be sure to include the policy number on any premiums mailed.
- Mailing address is:

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

- Please do not send checks without a policy number. This could delay issue.

### **Illustrations and Marketing Support:**

- Agents needing illustration and/or marketing support should contact their Life Sales Rep or a member of the Agent Services team at 800-842-9124 ext. 113 or email them at [salesupport@otfc.com](mailto:salesupport@otfc.com)



**Brokerage Services**  
Fax Number: 800-867-7205

**OAKTREE Brokerage**  
11166 Fairfax Blvd. Suite 300  
Fairfax, VA 22030  
Attn: Brokerage Services

Please fill in fields below.

**TRANSMITTAL**

DATE:

AGENT:

AGENT CODE:

AGENT FAX NUMBER:

AGENTPHONE NUMBER:

PROPOSED INSURED:

CARRIER:

SSN OR POLICY # (IF AVAILABLE):

ORDER EXAM  YES  NO

TOTAL # OF PAGES (WITH COVER SHEET):

NEW APPLICATION

REQUIREMENT

LICENSING

INFORMAL APPLICATION

Comments:

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