

HOW TO DO BUSINESS WITH MINNESOTA LIFE:

Submission:

- ALL new business applications **MUST** be emailed or faxed directly to Oaktree Brokerage.
- Email: brokerageservices@otf.com Fax: 800-867-7205
- When faxing or emailing applications, agents are **REQUIRED** to keep the original application for no less than 90 days. Please note that the original may be requested during this period for audit purposes.
- The applications must be **UNALTERED**.
- ON APPLICATIONS WITH MONEY PLEASE WAIT FOR YOUR CASE MANAGER TO EMAIL YOU WITH THE POLICY # AND WRITE IT IN THE MEMO SECTION OF THE CHECK:

Overnight Checks to:

**Attn: New Business
Oaktree Brokerage
11166 Fairfax Blvd., Suite 300
Fairfax, VA 22030**

- Fax a copy of the check with the application to your case manager.
- **DO NOT** SEND APPLICATIONS TO Minnesota Life as they will not be processed.
- If you do not receive an acknowledgement memo of receipt via email within 1 business day, please call your case manager for confirmation of receipt.

Checking Case Status:

- Agents are required to register on <http://LifeCenter.MinnesotaLife.com> to check pending cases status.
- You may also contact your Oaktree Brokerage case manager directly. Please have the client name and policy number ready when calling.

Requirements and Monies:

- **ALL** Requirements **MUST** be faxed to Oaktree Brokerage Services at 800-867-7205.
- All requirements are sent to Minnesota Life as they are received, however, please allow 3-4 business days for website updates.
- All initial premium checks should be mailed to the address above with Policy # in Memo Section of check.
- Please be sure to check the website before calling and allow 1 business day for a response. Please be sure to provide policy number and client name when calling.

Illustrations and Marketing Support:

- Please contact your Life Sales Rep or a member of the Sales Support Team at 800-488-9861 ext. 113 or salesupport@otfc.com
- Illustrations may be done through WinFlexWeb or the carrier website at <https://advisor.securian.com/sites/avs/idg>