

HOW TO DO BUSINESS WITH MUTUAL TRUST LIFE

Agents have two submission choices when working with Mutual Trust Life. You can use OAKTREE Brokerage or Mutual Trust Life's 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.
- Please use the New Business Transmittal attached.
- 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 from your assigned case manager.

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

Mutual Trust Life's Direct Access:

Submission:

- New business applications should be submitted via fax directly to 800-522-0449, emailed to underwriting@mutualtrust.com or mailed to the address below.
- Fax requirements to 800-522-0449 or email them at underwriting@mutualtrust.com

Mutual Trust Life Insurance Company
1200 Jorie Blvd.
Oakview, IL 60523-2269
Attention: New Business

Checking Case Status:

- Agents can register to track cases on line at <https://agent.mutualtrust.com/>
- Agents can call Mutual Trust Life Insurance at 800-323-7320 ext. 5440.

Please mail premiums to the address above.

Illustrations and Marketing Support:

- Agents are encouraged to register at <https://agent.mutualtrust.com/> to track all business and download carrier illustration software.
- Agents contracted directly with OAKTREE Life can call their Life Sales Rep or a member of the Sales Support Team at 800-842-9124 ext. 113.



Mutual Trust Home Office Directory

Home Office

1200 Jorie Boulevard • Oak Brook, IL 60523	
Toll Free	(800) 323-7320
Main Number	(630) 684-5335
Consumer Website	www.mutualtrust.com
Agent Website	agent.mutualtrust.com

Sales Development

Main Extension	x 5140
Fax	(630) 684-5493
SalesDevelopment@mutualtrust.com	

Anne Monroe	x 5470
Sales Development Specialist II	
MonroeA@mutualtrust.com	
Selling System: Circle of Wealth and Truth Concepts	

Kathleen Johnson	x 5353
Lead Sales Development Specialist	
JohnsonK@mutualtrust.com	
Selling System: Leap Systems	

Peggy Brennan	x 5303
Sales Development Specialist II	
BrennanP@mutualtrust.com	
Selling System: Wealth & Wisdom	

Rich Weizeorick	x 5309
Sr. Sales Development Specialist	
WeizeorickR@mutualtrust.com	
Selling System: Infinite Banking Concepts	
Area of Expertise: Business Planning Concepts	

New Business: Case Managers

Main Extension	x 5305
Fax	(800) 522-0449
CaseManager@mutualtrust.com	

Underwriters

Joel Jones	x 5373
Vice President, Chief Underwriter	
JonesJC@mutualtrust.com	

Carolyn Blumhagen	
Sr. Underwriter	
BlumhagenC@mutualtrust.com	

Erika Carson	
Sr. Underwriter	
CarsonE@mutualtrust.com	

Fred Medrano	
Sr. Underwriter	
MedranoF@mutualtrust.com	

Tonya Patton	
Sr. Underwriter	
PattonT@mutualtrust.com	

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Mutual Trust Home Office Directory

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Contracts & Licensing and Field Commissions Team

Main Extension	x 5110
Fax	(630) 684-5484
<i>AgentAdministration@mutualtrust.com</i>	

Policy Change Team

Main Extension	x 5070
Fax	(630) 684-5491
<i>PolicyChange@mutualtrust.com</i>	

Policy Owner Services Team

Main Extension	x 5060
Fax (Payments)	(630) 684-5445
Fax (In-force Services)	(630) 684-5444
<i>PolicyPayments@mutualtrust.com</i>	

Office Services/ Distribution Team

Main Extension	x 5555
Fax	(800) 522-0449
<i>Mailroom@mutualtrust.com</i>	

For any additional support, please contact your MGA.

Thank you.



MUTUAL TRUST
LIFE INSURANCE COMPANY

A Pan-American Life Insurance Group Stock Company