

## HOW TO DO BUSINESS WITH OAKTREE BROKERAGE and Pacific Life

### Submission:

- All new business applications **MUST** be faxed directly to **Oaktree Brokerage Services** at 800-867-7205 or emailed to [brokerageservices@otfc.com](mailto:brokerageservices@otfc.com) or mailed to the address below.
- 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**.
- ALL APPLICATIONS WITH MONEY **MUST** BE MAILED WITH ORIGINAL APPLICATION DIRECTLY TO THE ADDRESS BELOW.
- If you do not receive an acknowledgment email within 1 business day, please call or email for receipt confirmation.

### Checking Case Status:

- We encourage agents to register on the carrier websites 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 **MUST** be faxed to 800-867-7205 or emailed [brokerageservices@otfc.com](mailto:brokerageservices@otfc.com) 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:

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 illustrations should contact their Life Sales Rep or a member of the Sales Support Team at 800-842-9124 ext. 113 or email them at [salesupport@otfc.com](mailto:salesupport@otfc.com)

### Submission of Contracts:

- OAKTREE uses SURELC for all agent contracting. Please contact your Life Sales Rep for details.