# 8 Steps to Complete Life Policy

**Step 1: Create a file to keep records of each client**

Application, Quick Calc, Illustration, Policy Receipt Delivery, and any additional requirements

**Step 2: Create a Customer Data Base**

**Step 3: Mail All Application to FFS** (Tel: 770-662-2222)

**First Financial Security, Inc**
3070 Business Park Drive, Suite B
Norcross, GA 30071

**Attn: New Business**

**Step 4: Call Portamedic to schedule the Blood Exam**

(Call the same day you mail the application)

- ✓ **1-800-782-7373 (50 States)**
- ✓ **703-242-0522 (VA & DC)**
- ✓ **301-725-8570 (MD)**

**Step 5: Check FFS Website (your case status) everyday**

**Step 6: Deliver the Policy**

- ✓ Call your client to schedule an appointment to deliver the policy
- ✓ Have your client sign the policy receipt and any additional requested requirements

**Step 7: Scan a Signed Policy Receipt and Additional Requirements**

**Step 8: Email (*Do not mail*) a Signed Policy Receipt and Additional Requirements to FFS and LSW as below:**

- ✓ FFS Case Manager of that policy at *nbprocessor@firstfinancialsecurity.com*
- ✓ LSW at *nbrequirementimages@nationallife.com*