



Marketing Material Review Process (Independent Producers/Agencies)

Producer Resource Center (PRC)
888-724-4267, Extension 4680
Sagicor.com

The Sagicor Compliance Department must review and approve all sales and marketing materials that reference Sagicor or its products. All sales and marketing materials that originate outside of Sagicor (Independent Producers (IP), Agencies, etc.) should be submitted through the Regional Sales Manager (RSM) who is the liaison for the submitting producer/agency. The RSM will review the content of the material to confirm general accuracy, clarity and compliance with basic guidelines before sending it on to Corporate Communications (Corp Comm). Corp Comm will review the material for content accuracy, spelling, punctuation, grammar, capitalization and consistency with the Sagicor Brand before sending it to Compliance for review and approval.

1. The Independent Producer/Agency develops sales and/or marketing materials and sends it to the RSM
2. The RSM reviews the material for content accuracy and then sends to Corp Comm
3. Corp Comm reviews the material for content accuracy, grammar and consistency with Brand and then sends to Compliance
4. Compliance reviews for content accuracy and adherence to NAIC standards and sends the material back to Corp Comm with changes or approval
(If Compliance approves initial draft, skip to Step 9)
5. Corp Comm sends changes back to RSM
6. RSM sends changes back to IP/Agency for corrections
7. IP/Agency makes changes and sends back to RSM
8. RSM reviews changes and forwards to Corp Comm
9. Corp Comm reviews/confirms changes & sends a final, branded version of the material to Compliance
10. Compliance reviews final, branded version and send approval back to Corp Comm
(If more changes are required, return to Step 4)
11. Corp Comm sends approved, branded material to RSM
12. RSM forwards approved, branded material to IP/Agency for use

Please Note: A producer must not amend or alter the approved material in any way. This includes highlighting, bolding, underlining or changing the font on any text. Personalizing with agent/agency name or logo or any other additions are not permitted.

Sagicor Life Insurance Company • 4343 N. Scottsdale Rd., Suite 300 • Scottsdale, AZ 85251 • T (888) 724-4267

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