

Protective[®] Velocity customer portal

Submit and sign applications, review your policy information, schedule exams and more — all in one conveniently accessible customer portal designed specifically for you.

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Introduction to the customer portal

Introducing the customer portal — powered by Velocity



Protective continues to enhance your experience by implementing new technology and capabilities that makes your policy more accessible to you.



The customer portal introduces new, self-service capabilities that allow you to register for an account, complete medical questions online or via phone interview, e-sign applications, schedule interviews or exams, and check their policy status — all online and at your convenience.



Once a decision is made by our underwriting team, your electronic policy will be available to complete and sign online via the customer portal.

Registering for customer portal access

Registering for customer portal access

After you meet with your financial representative to complete your pre-application, and once you receive your registration link via text or email — you will then be able create an account and gain access to the customer portal. Once you register, create, and then sign-in to your account, you will be redirected to the customer portal.

You will choose to either register for a new account (if you DO NOT have a preexisting policy with us), or if you already have an additional life or annuity policy with us, you will be matched to your existing account via your name, email, date of birth and Social Security Number.* Either way, you'll click the Register now button to get started.

Mobile



Desktop



*If criteria does not match an existing registered email, you will need to call Protective to update information.

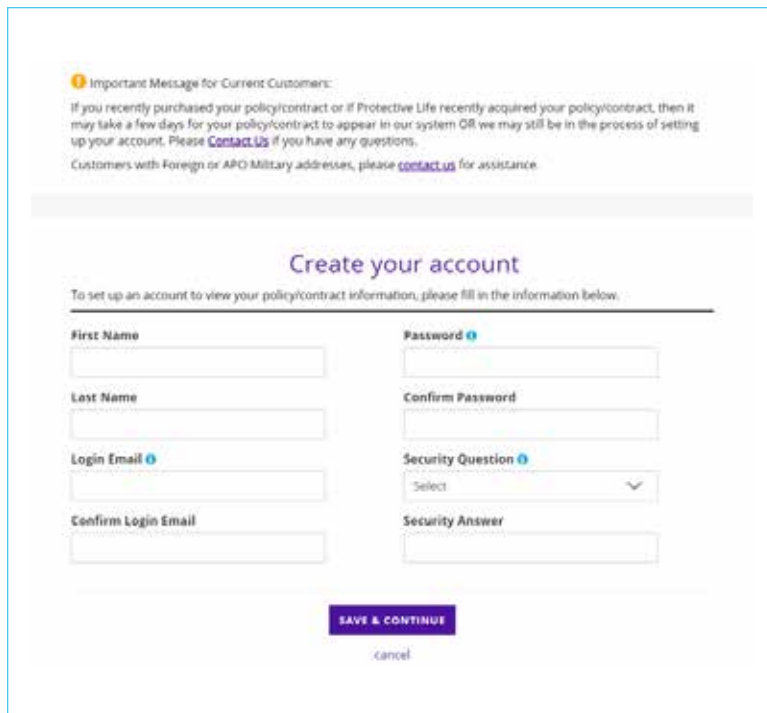
Registering for customer portal access

Registering as a new customer

You will be prompted to enter the information required to create your account and gain access to the customer portal.

At this step, you will provide:

- Your name
- Email
- Password (created at this step)
- Security question (to reset password if needed)
- Elect if you're obtaining life insurance for personal or business reasons (personal is most common)



Important Message for Current Customers:
 If you recently purchased your policy/contract or if Protective Life recently acquired your policy/contract, then it may take a few days for your policy/contract to appear in our system OR we may still be in the process of setting up your account. Please [Contact Us](#) if you have any questions.
 Customers with Foreign or APO Military addresses, please [contact us](#) for assistance.

Create your account

To set up an account to view your policy/contract information, please fill in the information below.

First Name	Password
<input type="text"/>	<input type="password"/>
Last Name	Confirm Password
<input type="text"/>	<input type="password"/>
Login Email	Security Question
<input type="text"/>	Select ▼
Confirm Login Email	Security Answer
<input type="text"/>	<input type="text"/>

SAVE & CONTINUE
cancel

Confirmation email and setting up two-factor authentication

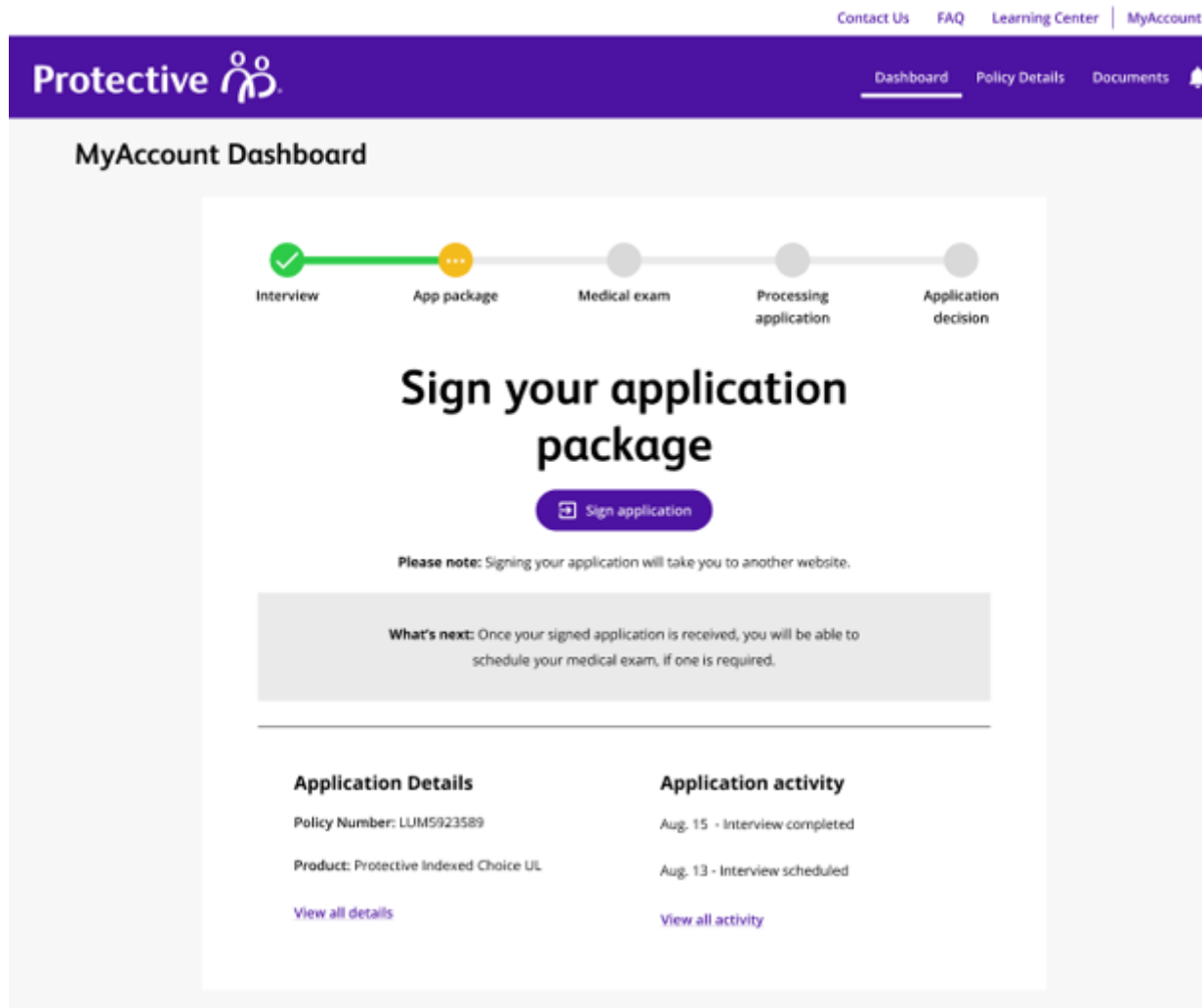
The first time you login at myaccount.protective.com, you will be required to set up two-factor authentication. At this point, you may choose to either use your mobile number or email to receive your two-factor authentication code — then click the send code button.

Please note this step is required every time you log into the customer portal.

Signing your application digitally

When you have completed your online or phone interview, you can authorize and sign your policy digitally via the customer portal as one of the many options to sign. You will get an email notification when your policy is finalized and ready to be signed.

Once you login and click on your dashboard, you should see a screen like the one below. You will click on the sign application button, and then redirected to an Adobe page where you can electronically sign your policy.



The screenshot shows the 'MyAccount Dashboard' with a navigation bar at the top containing 'Contact Us', 'FAQ', 'Learning Center', and 'MyAccount'. Below the navigation bar, there are links for 'Dashboard', 'Policy Details', and 'Documents'. The main content area features a progress bar with five steps: 'Interview' (completed), 'App package' (current step), 'Medical exam', 'Processing application', and 'Application decision'. A large heading reads 'Sign your application package' with a prominent 'Sign application' button. A note states: 'Please note: Signing your application will take you to another website.' Below this, a 'What's next' section explains: 'Once your signed application is received, you will be able to schedule your medical exam, if one is required.' At the bottom, there are two columns: 'Application Details' (Policy Number: LUM5923589, Product: Protective Indexed Choice UL, View all details) and 'Application activity' (Aug. 15 - Interview completed, Aug. 13 - Interview scheduled, View all activity).

You will use our Adobe e-sign solution to review and sign your policy documents. Adobe walks you through step by step on each line you need to sign or provide information.

Click on the click here to sign field to add your signature to the document. Once you finish signing the documents, your case will be submitted to our home office for review. Then we will get started on our internal underwriting and case management process.

By signing below, I confirm that:

I can access and read this Electronic CONSENT TO ELECTRONIC RECEIPT OF ELECTRONIC CONSUMER DISCLOSURES document; and

I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and

Until or unless I rescind my consent to do business electronically with Protective Life as described above, I consent to receive electronic delivery of all notices, disclosures, authorizations, acknowledgements, and other documents from Protective Life, to the extent permitted by law.

X [Click here to sign](#) **X** 09/15/2022

Proposed Insured **AIMEE WALSH** Date

Adobe Sign Test Document
Not for commercial use

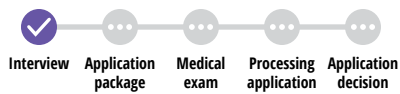
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That's it. You're done!

Tracking your policy status

Once you have completed the registration, application submission and signature/authorization you can log into the customer portal anytime to track and review the status of your policy.

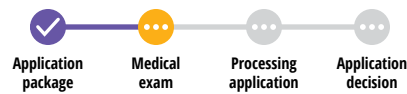
Status progression through the entire process*



We have received your request for life insurance. Check back soon for a status update.

Step 1:

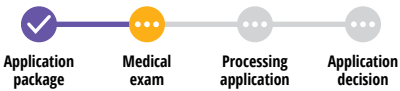
- Interview has been completed
- Application package has not been processed yet



Sign your application package.

Step 2:

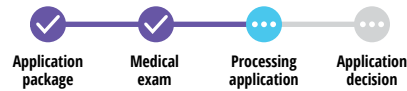
- Interview has been completed
- Application package has been generated and needs to be signed



Complete your medical exam.

Step 3:

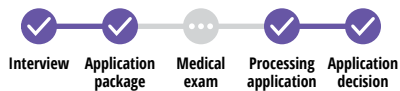
- Paper application or interview done before accessing site
- Application package completed
- Medical exam outstanding



You're all set!

Step 4:

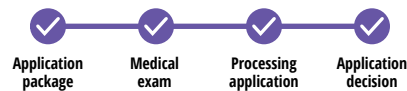
- Paper app or interview done before accessing site
- Application package completed
- Medical exam completed
- Application decision pending internally



Congratulations!

Step 5:

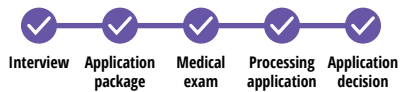
- Interview has been completed
- Application package has been signed
- No medical exam needed
- Application decision approved



**Congratulations!
Your application has been accepted.**

Step 6:

- Interview has been completed
- Application package has not been processed yet



**Congratulations!
Application complete.**

Contract Generated/ EPD complete:

- All steps complete
- Electronic Policy Delivery completed or policy mailed

Please note: status steps are only examples and will be based on your individual requirements and applications.



Contact your financial representative or Protective with any questions.

Extra help and resources

Call Protective at (800) 366-9378 and press 1.

Monday - Thursday: 7:30 AM - 6:00 PM CT, Friday: 7:00 AM - 5:00 PM CT

protective.com/MyApplication

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