



Client Manager

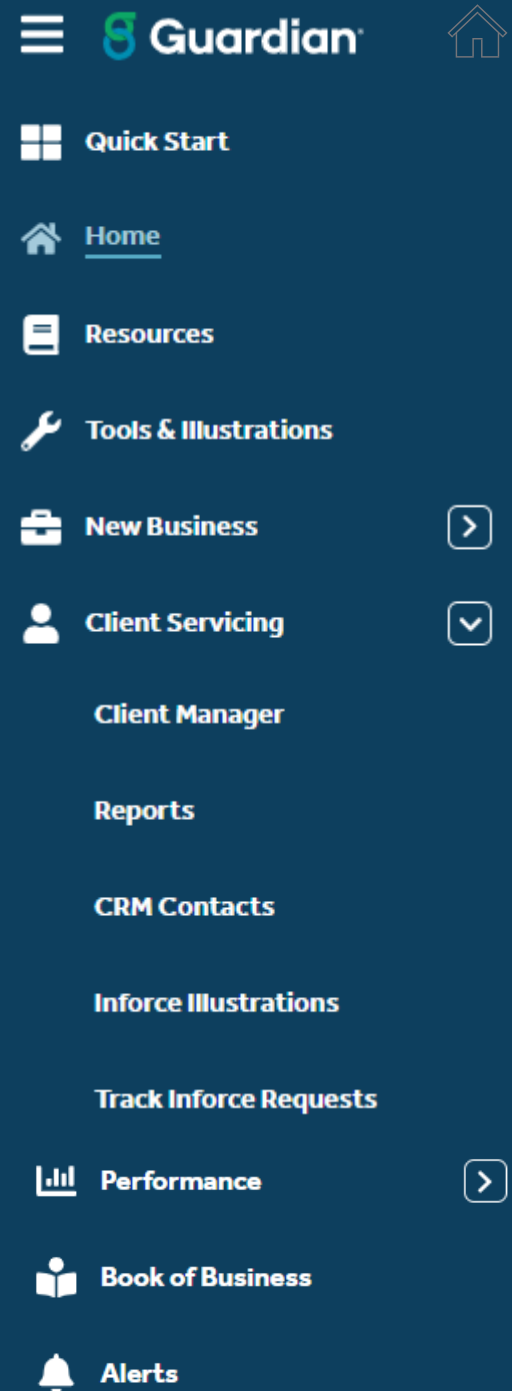
To go directly to the Servicing Agent Changes for the February 23, 2024 release click [here](#)

Client Servicing

How To Navigate GOL

To access Client Servicing, it is found under **Home** on the left side landing page. The platforms available under Client Servicing are **Client Manager, Reports, CRM Contacts, Inforce Illustrations Dashboard** and **Track Inforce Requests**.

1. Client Manager is being moved from Legacy to new GOL in stages. **Client Manager** will remain accessible in Legacy for functionality not yet in the new GOL.
2. A new **Reports** menu is being added under Client Servicing, where you will now find the GOM Reports functionality.
3. Access the beginning deliveries of Producer Workspace, including Contact Details, Policies, and Tasks, under the Client Servicing dropdown and selecting **CRM Contacts**.
*Please note, an active SmartOffice subscription is required to access Producer Workspace and CRM Contacts.
4. The **Inforce Illustrations Dashboard** can be accessed under the Client Servicing drop down. The entire Inforce Life book of business can be found here.
5. **Track Inforce Requests** are available to view all requests and status of each request.



Client Manager - Overview

How To Navigate GOL

Client Manager is found under **Client Servicing** on the main menu. Legacy Client Manager will remain accessible in Legacy for functionality not yet in the new GOL. The following is available in the new GOL:

- Policy details for Life, Disability, Berkshire Pre- Merger, Annuity and Long-Term Care
- Print functionality for customer reports for Life and Disability policies within Client Manager Policy Details
- Policy reports available for Annuity and Long-Term Care policies
- Alerts tab within Client Manager
- Quote functionality for Life policies, including fair market value (712), loan/withdrawal, minimum deposit/mode change, nonforfeiture, premium paid in advance, reinstatement & surrender.
- Linked accounts
- Service requests for address changes, policy loans, mode changes , change servicing agent, change name (owner, beneficiary or address), trust certificate, dividend withdrawal, dividend option change (Form V167), fund allocation of net annual premiums and fund allocation and transfer.
- Document search
- Combined documents
- Servicing agent changes

Client Manager - Policy & Print

How To Guide: Guardian Online (GOL)

1. **Client Manager Advanced Search** is now represented under the **Policies** tab in Client Manager
2. Pull up policies by using the **Quick search** or **Filters** function. Use the **Quick search** feature to pull up policies by specific names, policy numbers and SSN. **Filters** allows you to narrow your search further.

The screenshot displays the Guardian Client Manager interface. On the left is a dark blue sidebar with a menu. The 'Client Manager' option is highlighted with a red box and a red circle containing the number '1'. The main content area is titled 'Client Manager' and features a search bar at the top with a magnifying glass icon and the text 'Search...'. Below this, there are several tabs: 'Policies' (highlighted with a red box and a red circle containing '1'), 'Linked accounts', 'Document search', 'Combined documents', and 'Servicing agent changes'. Under the 'Policies' tab, there is a 'Quick search' section with a search input field containing the text 'Search names, policies or SSN' and a 'Filters' button (highlighted with a red box and a red circle containing '2'). To the right of the search input are 'Export' and 'Print' buttons. Below the search section, there is a status bar with filters: 'Access: My agencies', 'Policy status: Active', 'Date issued: Custom', 'From: 12/21/2022', 'To: 04/20/2023', and a 'Clear Filters' link. A message states: 'Run a report is coming soon. Currently, go to [Legacy Client Manager](#).' Below this is a 'Customize' section with a table of columns: 'Policy/contract', 'Insured', 'Insured DOB', 'Owner', 'Owner SSN', 'Issued', 'LOB', 'Product', and 'Modal premium'. The table is currently empty, and a message at the bottom says: 'Use Quick search or Filters to see results here.'

Client Manager - Policy & Print

How To Guide: Guardian Online (GOL)

3. With search results now in table format, the **Export** feature allows for exporting and sorting.
4. Search results printing can be accessed via the **Print** button. A pop-up screen displays the types of reports available to print. Make your selection and click **Print**.

The screenshot displays the 'Client Manager' interface. At the top, there are navigation tabs: 'Policies', 'Linked accounts', 'Document search', 'Combined documents', and 'Servicing agent changes'. Below these is a 'Quick search' section with a search input field containing 'Search names, policies or SSN' and a 'Filters' button. To the right of the search bar are two red circular callouts: '3' pointing to the 'Export' button and '4' pointing to the 'Print' button. Below the search bar, there is a status bar with filters: 'Access: My agencies', 'Policy status: Active', 'Date issued: Custom', 'From: 09/18/2022', 'To: 01/16/2023', and a 'Clear Filters' button. A message states: 'Run a report is coming soon. Currently, go to [Legacy Client Manager](#).' Below this is a 'Customize' section with a table of search results. The table has columns: 'Policy/contract', 'Insured', 'Insured DOB', 'Owner', 'Owner SSN', 'Issued', 'LOB', 'Product', and 'Modal premium'. A single row of data is visible, with some fields blurred. An orange arrow points from the 'Print' button in the top right to a pop-up modal. The modal is titled 'What report type would you like to print?' and has a 'Report type' section with two radio buttons: 'Policy status' (selected) and 'Customer report'. Below this is a 'Notes' section with three bullet points: 'For Search results a maximum of 500 policies can be printed at one time.', 'Policy status and Customer report can only print the first 30 policies selected at a time.', and 'Customer report requires a Life or Disability policy be selected before running.' At the bottom of the modal are 'Cancel' and 'Print' buttons.

Client Manager - Policy & Print

How To Guide: Guardian Online (GOL)

5. Navigate to **Legacy Client Manager Advanced Search** by selecting **Legacy Client Manager** link

The screenshot displays the 'Client Manager' interface. At the top, there are four tabs: 'Policies', 'Linked accounts', 'Document search', and 'Combined documents'. Below the tabs is a 'Quick search' section with a search input field containing the placeholder text 'Search names, policies or SSN' and a 'Filters' button. Underneath the search bar, there are filter options: 'Access: My agencies', 'Policy status: Active', 'Date issued: Custom', 'From: 09/18/2022', and 'To: 01/16/2023', followed by a 'Clear Filters' button. At the bottom of the interface, a message states 'Run a report is coming soon. Currently, go to [Legacy Client Manager](#).' The link 'Legacy Client Manager' is highlighted with a red box, and a red circle with the number '5' is positioned to its right.

Client Manager - Policy & Print

How To Guide: Guardian Online (GOL)

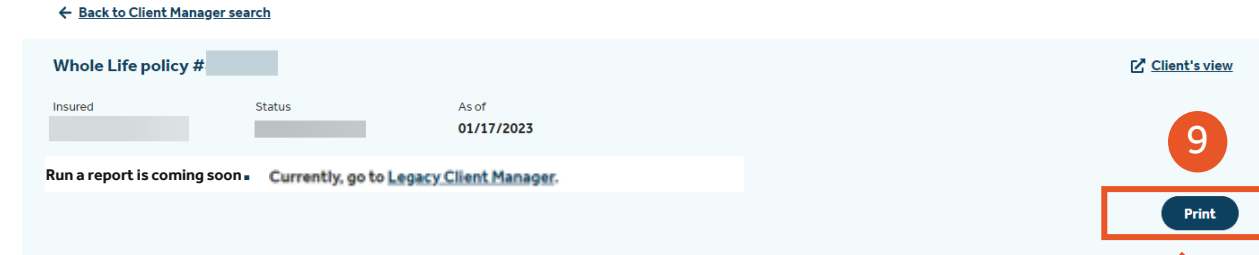
6. The **Client Manager Policy Details** screen for a specific policy can be opened via a hyperlink by selecting the policy/ contract number.
7. The **Client's view** link now opens the policy in the Client Portal site.
8. To navigate to the **Legacy Client Manager Policy Details** for the specific policy being viewed, select the **Legacy Client Manager** link.

The screenshot displays the 'Client Manager' interface. At the top, there are navigation tabs: 'Policies', 'Linked accounts', 'Document search', 'Combined documents', and 'Servicing agent changes'. Below these is a 'Quick search' section with a search box containing 'Search names, policies or SSN' and a 'Filters' button. To the right are 'Export' and 'Print' buttons. Below the search is a status bar: 'Access: My agencies Policy status: Active Date issued: Custom From: 09/19/2022 To: 01/17/2023 Clear Filters'. A message reads: 'Run a report is coming soon. Currently, go to Legacy Client Manager.' Below this is a 'Customize' section with a table of policy details. The table has columns: Policy/contract, Insured, Insured DOB, Owner, Owner SSN, Issued, LOB, Product, and Modal premium. The first row is selected, with a red box around the '12345' in the 'Policy/contract' column and a red circle '6' next to it. An arrow points from this circle to a detailed view of the policy. This detailed view shows a 'Back to Client Manager search' link, 'Whole Life policy #' with a red box around it, and a 'Client's view' link with a red box around it and a red circle '7'. Below this is another message: 'Run a report is coming soon. Currently, go to Legacy Client Manager.' with a red box around the link and a red circle '8'. At the bottom, there are tabs: 'Policy', 'Owner / Beneficiary', 'Agents', 'Alerts', and 'Quotes'. A 'Print' button is also visible.

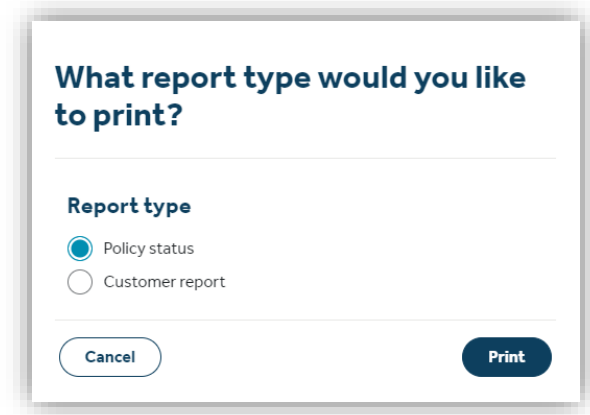
Client Manager - Policy & Print

How To Guide: Guardian Online (GOL)

- To print the policy details, select the **Print** button. A pop-up screen will display listing the two report types. Select either **Policy status** or **Customer report** and click **Print**. If neither report is needed, click **Cancel**.



[Policy](#) [Owner/Beneficiary](#) [Agents](#) [Alerts](#) [Quotes](#) [Transactions](#) [Documents](#)



Client Manager - Policy Print

How To Guide: Guardian Online (GOL)

10. In the **Client Manager Policy Details** screen there is a right-hand panel that can be used to navigate to the different sections. All links are clickable, directing to the exact location of the page without having to scroll down to search for each section.

← Back to Client Manager search

Whole Life policy # [redacted] [Client's view](#)

Insured [redacted] Status [redacted] As of 01/17/2023

Run a report is coming soon • Currently, go to Legacy Client Manager.

Print

Run a report is coming soon • Currently, go to Legacy Client Manager.

Policy Owner/Beneficiary Agents Alerts Quotes Transactions Documents

As of (Required) Clear
01/17/2023 Apply

Insured

Full name	Date of birth	SSN (Owner)	Sex	Rating	Non-smoker discount	Issue age
[redacted]	[redacted]	xxx-xx-[redacted]	Male	PPNT	[redacted]	55

Coverage

Coverage	Form #	Premium	Cash value	Face amount	Expiration date	Final conversion date
15 Pay Whole Life	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	-

10 On this page

- Insured
- Coverage
- Basic / rider cash value information
- Policy information
- Payments
- Automatic payments
- Benefits
- Loans
- Dividends
- PUA/PUI
- Modified endowment contract (MEC)
- Tax reporting
- LTC claim information
- Chronic / terminal illness

Client Manager - Policy & Print

How To Guide: Guardian Online (GOL)

11. There are 7 different tabs in the Client Manager Policy Details screen. Each tab has relevant information under each tab on the policy. Those are **Policy**, **Owner/ Beneficiary**, **Agents**, **Alerts**, **Quotes**, **Transactions** and **Documents**.

← Back to Client Manager search

Whole Life policy # [redacted] [Client's view](#)

Insured [redacted] Status [redacted] As of 01/17/2023

Run a report is coming soon. Currently, go to Legacy Client Manager.

Print

11

Policy Owner / Beneficiary Agents Alerts Quotes Transactions Documents

As of (Required) Clear
01/17/2023 Apply

Owner Assignees Beneficiary Applicant

Name Policy Owner / Beneficiary Agents Alerts Quotes Transactions Documents

As of (Required) Clear
Date of birth 01/17/2023 Apply

Email Servicing agent

Servicing agency Servicing agency code Servicing agent status Active

Address Servicing agent Servicing agent code

Phone Writing agent

From date (Required) Clear To date (Required) Clear
Writing agent name 10/19/2022 01/17/2023 Apply Export

Alert type Owner Producer Alert Alert Status

Policy Owner / Beneficiary Agents Alerts Quotes Transactions Documents

Select a quote to run

Quote types
Select

Quote history
Quotes will be kept for

Run date

Policy Owner / Beneficiary Agents Alerts Quotes Transactions Documents

From date (Required) Clear To date (Required) Clear Transaction type Clear
11/10/2022 11/10/2023 Select Apply

Print transactions

Policy Owner / Beneficiary Agents Alerts Quotes Transactions Documents

From date (Required) Clear To date (Required) Clear
08/10/2023 11/10/2023

Document type Clear
Select

Apply

Client Manager – Quote Function

How To Guide: Guardian Online (GOL)

Quote functionality for Life Policies available

1. Select the **Quotes** tab under the **Client Manager Policy Details** screen
2. Once in the Quotes tab, you can select seven different quote types from the dropdown menu.
 - Fair market value (712)
 - Loan/ withdrawal
 - Minimum deposit/ mode change
 - Nonforfeiture
 - Premium paid in advance
 - Reinstatement
 - Surrender

The screenshot displays the 'Client Manager' interface for a 'Whole Life policy #'. At the top, there are fields for 'Insured', 'Status', and 'As of' (01/18/2023). A notification banner states 'Run a report is coming soon. Currently, go to Legacy Client Manager.' with a 'Print' button. The navigation menu includes 'Policy', 'Owner / Beneficiary', 'Agents', 'Alerts', 'Quotes', 'Transactions', and 'Documents'. The 'Quotes' tab is highlighted with a red box and a red circle containing the number '1'. Below the navigation, a section titled 'Select a quote to run' features a dropdown menu for 'Quote types' with a red box and a red circle containing the number '2'. The dropdown menu lists the following options: 'Select', 'Fair market value (712)', 'Loan / withdrawal', 'Minimum deposit / mode change', 'Nonforfeiture', 'Premium paid in advance', 'Reinstatement', and 'Surrender'. Below the dropdown, there are filters for 'Quote type', 'Effective date', and 'Quote number'.

Client Manager – Quote Function

How To Guide: Guardian Online (GOL)

Quote functionality for Life Policies available

3. The **Quote history** will always display on the page. As new information is loaded onto the page, the older information will display below it while processing the quote.
4. The **Run quote** button allows you to submit the quote.

The screenshot shows the 'Quote Function' interface in the Guardian Client Manager. At the top, there is a header with 'Whole Life policy #' and a 'Client's view' link. Below this, there are fields for 'Insured', 'Status', and 'As of' (01/18/2023). A message states 'Run a report is coming soon - Currently, go to Legacy Client Manager.' with a 'Print' button. A navigation bar includes 'Policy', 'Owner / Beneficiary', 'Agents', 'Alerts', 'Quotes' (selected), 'Transactions', and 'Documents'. Under 'Select a quote to run', there is a 'Quote types' dropdown menu. The 'Quote history' section is highlighted with a red circle containing the number 3, and it includes a note: 'Quotes will be kept for 30 days. Select document from quote table column to view document.' Below this is a table with columns: 'Run date', 'Quote type', 'Effective date', and 'Quote number'. At the bottom, a large green 'Run quote' button is highlighted with a red circle containing the number 4.

Client Manager – Alerts Access

How To Guide: Guardian Online (GOL)

Ability to access and view alerts in Client Manager

1. There is a tab for Alerts directly in Client Manager which provides immediate access for specific policy/contract.
2. The date fields are editable. Select a specific date range and hit **Apply**.

The screenshot shows the Client Manager interface for a specific policy. At the top, there is a navigation bar with tabs: Policy, Owner / Beneficiary, Agents, Alerts (highlighted with a red box and a '1' in a red circle), Quotes, Transactions, and Documents. Below the tabs, there are date selection fields for 'From date (Required)' and 'To date (Required)', both with 'Clear' links. The 'From date' is set to 10/20/2022 and the 'To date' is set to 01/18/2023. An 'Apply' button is highlighted with a red box and a '2' in a red circle. Below the date fields is a table of alerts.

Alert type	Owner name	Producer	Alert category	Alert date	Alert status	Status updated
Policy Document (Life and DI)			Review Client Activity	10/26/2022	Archived	11/26/2022 System Archive
			Review Client Activity	10/25/2022	Archived	11/25/2022 System Archive

Client Manager – Alerts Access

How To Guide: Guardian Online (GOL)

Ability to access and view alerts in Client Manager

- Alerts display for the specific policy/ contract and date range.
- Select applicable alert type hyperlink for details.

The screenshot shows the 'Alerts' tab in the Client Manager interface. At the top, there is a navigation bar with 'Back to Client Manager search' and 'Client's view'. Below this, a summary section displays 'Whole Life policy #' followed by a redacted ID, 'Insured' (redacted), 'Status: Premium Paying', and 'As of: 01/18/2023'. A message states 'Run a report is coming soon - Currently, go to Legacy Client Manager.' with a 'Print' button.

The main interface includes tabs for 'Policy', 'Owner / Beneficiary', 'Agents', 'Alerts', 'Quotes', 'Transactions', and 'Documents'. Below the tabs are filters for 'From date (Required)' (10/20/2022) and 'To date (Required)' (01/18/2023), with 'Clear' buttons and an 'Apply' button. An 'Export' button is also present, with a red circle containing the number '3' next to it.

The alert table is highlighted with a red border and contains the following data:

Alert type	Owner name	Producer	Alert category	Alert date	Alert status	Status updated
Policy Document (Life and DI)	[Redacted]	[Redacted]	Review Client Activity	10/26/2022	Archived	11/26/2022 System Archive
[Redacted]	[Redacted]	[Redacted]	Review Client Activity	10/25/2022	Archived	11/25/2022 System Archive

A red circle with the number '4' is placed over the first alert's title, with an arrow pointing to a detailed view window. The detailed view window is titled 'Policy Document (Life and DI)' and contains the following information:

- Insured name : [Redacted]
- Policy date : 09/20/2022
- Creation date : 10/25/2022
- Document : PHD
- Document description : Status Changes
- Alert status : Archived

A 'Done' button is located at the bottom right of the detailed view window.

Client Manager – Linked Accounts

How To Guide: Guardian Online (GOL)

Linked accounts allows you to link together multiple policies within a household or business.

1. To link accounts, select **Client Manager** on the left-hand navigation.
2. Under the **Policies** tab, there is a **Link accounts** to link accounts together or add a new account to an existing linked account.

The screenshot displays the Guardian Client Manager interface. On the left is a dark blue navigation sidebar with the Guardian logo at the top. The sidebar contains several menu items: Quick Start, Home, Resources, Tools & Illustrations, New Business, Client Servicing, Client Manager (highlighted with a red box and a red circle containing the number 1), Reports, and CRM Contacts. The main content area is titled 'Client Manager' and has four tabs: Policies (selected), Linked accounts, Document search, and Combined documents. Below the tabs is a 'Quick search' section with a search input field containing the placeholder text 'Search names, policies or SSN' and a 'Filters' button. Below the search field are filter options: 'Access: My business', 'Policy status: Active', 'Date issued: Custom', 'From: 02/06/2023', 'To: 06/06/2023', and a 'Clear Filters' button. A message states 'Run a report is coming soon.. Currently, go to [Legacy Client Manager](#).' Below this is a 'Customize' section with two buttons: 'Service request' and 'Link accounts' (highlighted with a red box and a red circle containing the number 2). At the bottom of the screenshot is a table with columns: Policy/contract, Insured, Insured DOB, Owner, and Owner SSN.

Client Manager – Linked Accounts

How To Guide: Guardian Online (GOL)

3. To link accounts, type client name in search field to generate policies.
4. Select policies you want to link.
5. Click **Link accounts** button.

3

Quick search

Q Paul Smith Filters

Export Print

Access: My agencies Quick search: Smith Clear Filters

Run a report is coming soon. Currently, go to [Legacy Client Manager](#).

Customize

5

Link accounts

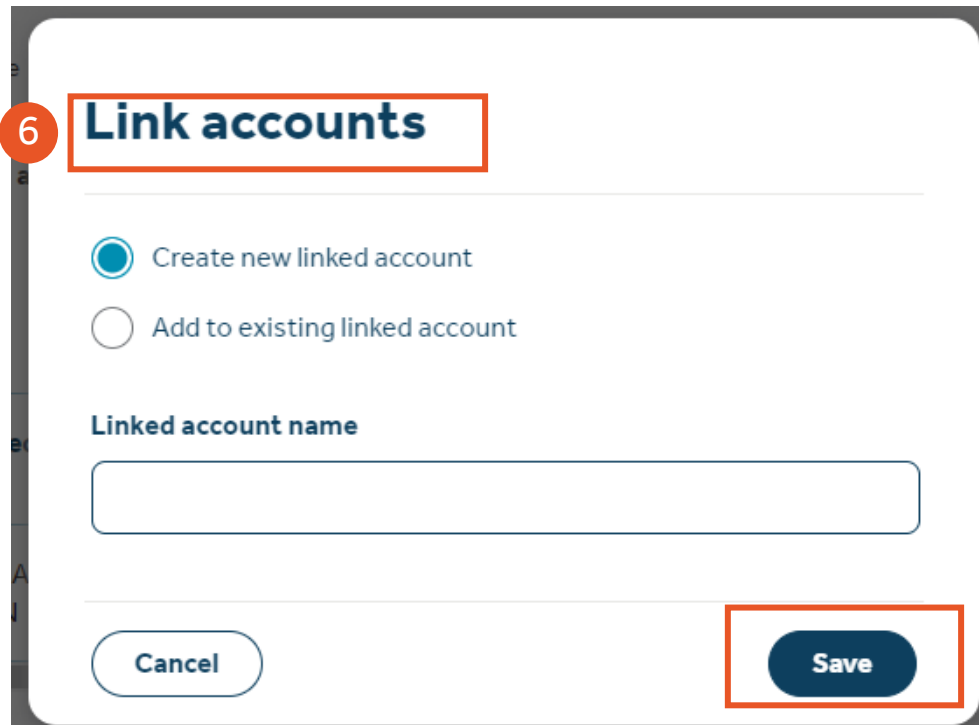
4

<input type="checkbox"/>	Policy/ contract	Insured	Insured DOB	Owner	Owner SSN	Issued	LOB	Product	Modal premium
<input checked="" type="checkbox"/>	123456	Paul Smith	1/27/1982	Paul Smith	xxx-xx-last 4	6/9/2005	Life	WL	\$114.16
<input checked="" type="checkbox"/>	7654321	Paul Smith	1/27/1982	Paul Smith	xxx-xx-last 4	11/10/2010	Life	WL	\$168.52
<input type="checkbox"/>	444555	Paul Smith	1/27/1982	Paul Smith	xxx-xx-last 4	7/5/2012	Annuity	GGIA2P	-

Client Manager – Linked Accounts

How To Guide: Guardian Online (GOL)

6. Option to **Create new linked account**
7. Or option to **Add to existing linked account**
8. Click **Save** and the changes will reflect instantly in your **Linked accounts** tab on **Client Manager**.

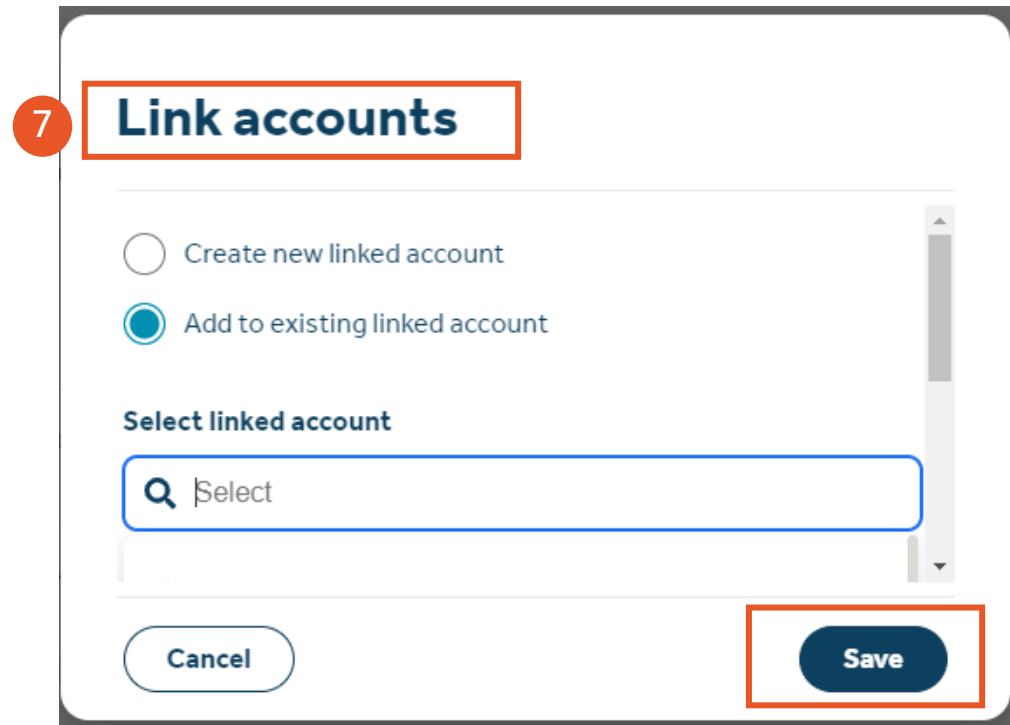


6 **Link accounts**

Create new linked account

Add to existing linked account

Linked account name



7 **Link accounts**

Create new linked account

Add to existing linked account

Select linked account

Client Manager – Edit Linked Accounts

How To Guide: Guardian Online (GOL)

1. The GOL user can click on **Linked accounts**, to see all linked accounts they have created.

Policies **Linked accounts** **1** Document search Combined documents

Quick search

Filters

Access: My business Policy status: Active Date issued: Custom From: 02/06/2023 To: 06/06/2023 [Clear Filters](#)

Run a report is coming soon. **Currently, go to [Legacy Client Manager](#).**

Customize









Link accounts

<input type="checkbox"/>	Policy/ contract	Insured	Insured DOB	Owner	Owner SSN
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Client Manager – Linked Accounts

How To Guide: Guardian Online (GOL)

2. Click on trash can to delete linked accounts. (This does not delete the policy, just the joining of the accounts)
3. Click on the pencil to edit the linked accounts.
 - Edit account name
 - Add policy
 - Remove policy

Policies	Linked accounts	Document search	Combined documents	Servicing agent changes
Accounts				
▼	Linked account name ▲	Policy	Insured name	Actions
^	A-Scott	-	-	 
		3069326	ALEX SMITH	
		5174345	A JOHN PASSANANTE	
		6208312	A JOHN PASSANANTE	
		6514674	A JOHN PASSANANTE	
		Z3409430	AARON SMITH	
▼	Annuity	-	-	 
▼	BisrQyBr	-	-	 
▼	BiwvYBWd	-	-	 

Client Manager – Linked Accounts

How To Guide: Guardian Online (GOL)

4. Change account name by clicking into field and typing new name.
5. Search for policies within your book of business and add to Linked account directly from edit screen.
6. Click to select policy and click **Add policies**

The screenshot shows the 'Client Manager' interface with the 'Linked accounts' tab selected. The 'Edit linked account' section contains a text input field for the 'Linked account name' (required) with the value 'Adams – Monica & Patrick'. Below this is a 'Quick search' input field containing 'Janice Adams'. A table below the search field lists policies with columns for 'Insured name', 'Policy', and 'Tax ID / SSN'. The table has one row with 'Janice Adams' and '554444'. A red box highlights the checkbox in the first column of this row, with a red arrow pointing to a dark blue 'Add policies' button at the bottom of the screen.

Client Manager

Policies Linked accounts Document search Combined documents Servicing agent changes

Edit linked account

4 **Linked account name** (Required)
Adams – Monica & Patrick

5 **Quick search**
Janice Adams

<input type="checkbox"/>	Insured name ▾	Policy ▲	Tax ID / SSN
6 <input type="checkbox"/>	Janice Adams	554444	








Add policies

Client Manager – Linked Accounts

How To Guide: Guardian Online (GOL)

- Once policy has been selected, click on **Save**. They will instantly be saved in your **Linked accounts** tab for easy access.

Selected policies for Adams – Monica & Patrick

Insured name 	Policy 	Tax ID / SSN	Remove
Janice Adams	5554444	xxx-xx-last 4	
Monica Adams	1234567		
Patrick Adams	7654321		
Fawn Adams	1112222		
Scott Adams	2221111		



Client Manager – Service Request

How To Guide: Guardian Online (GOL)

The Service request functionality enables you to make changes to the following:

- Address changes (Billing and Residential)
- Policy loans
- Mode changes (**new** 'Annual Draft' and 'Semi-Annual Draft' choices)
- Change Servicing Agent
- Change Owner/ Beneficiary
- Trust Certificate
- Dividend Option Change, etc. (Form V167)
- Fund allocation of Net Annual Premiums (Variable Life only)
- Fund allocation and Transfer (Variable Life only)

Client Manager – Service Request

How To Guide: Guardian Online (GOL)

1. To service an account, select **Client Manager** on the left-hand navigation.
2. Under the **Policies** tab, there is a **Service request** option.

The screenshot displays the Guardian Client Manager interface. On the left is a dark blue navigation sidebar with the Guardian logo at the top. The sidebar contains the following items: Quick Start, Home, Resources, Tools & Illustrations, New Business, Client Servicing, Client Manager (highlighted with a red box and a '1' in a red circle), Reports, and CRM Contacts. The main content area is titled 'Client Manager' and has several tabs: Policies (selected), Linked accounts, Document search, Combined documents, and Servicing agent changes. Below the tabs is a 'Quick search' section with a search input field containing the placeholder text 'Search names, policies or SSN' and a 'Filters' button. Below the search field are filter options: 'Access: My business', 'Policy status: Active', 'Date issued: Custom', 'From: 02/06/2023', 'To: 06/06/2023', and a 'Clear Filters' button. A message states: 'Run a report is coming soon. Currently, go to [Legacy Client Manager](#).' Below this is a 'Customize' section with two buttons: 'Service request' (highlighted with a red box and a '2' in a red circle) and 'Link accounts'. At the bottom, there is a table with columns: Policy/contract, Insured, Insured DOB, Owner, and Owner SSN.

Client Manager – Service Request

How To Guide: Guardian Online (GOL)

3. To service a policy, type client name, policy # or SSN in search field to generate policies.
4. Select a policy you want to service.
5. Click **Service request** button.

Client Manager

[Policies](#) [Linked accounts](#) [Document search](#) [Combined documents](#) [Servicing agent changes](#)

3 [Filters](#) [Export](#) [Print](#)

Access: My agencies Quick search: miller [Clear Filters](#)

Run a report is coming soon. Currently, go to [Legacy Client Manager](#).

[Customize](#)

5 [Service request](#) [Link accounts](#)

<input type="checkbox"/>	Policy/ contract	Insured	Insured DOB	LOB	Product	Modal premium	Mode	Paid to	Total benefit	Current value	Policy status
4 <input checked="" type="checkbox"/>	2123456	Eddie Smith	1/27/1942	Life	WL	\$82.21	Quarterly	6/27/2023	\$18,000		Active

Client Manager – Service Request

How To Guide: Guardian Online (GOL)

6. The **Service Request** page displays with only the service request types shown for the specific policy selected.

← [Back to Client Manager search](#)

Service Request

Selected policies:

2123456 - Eddie Smith

6

Request type
Some service request types are not available for all policies.

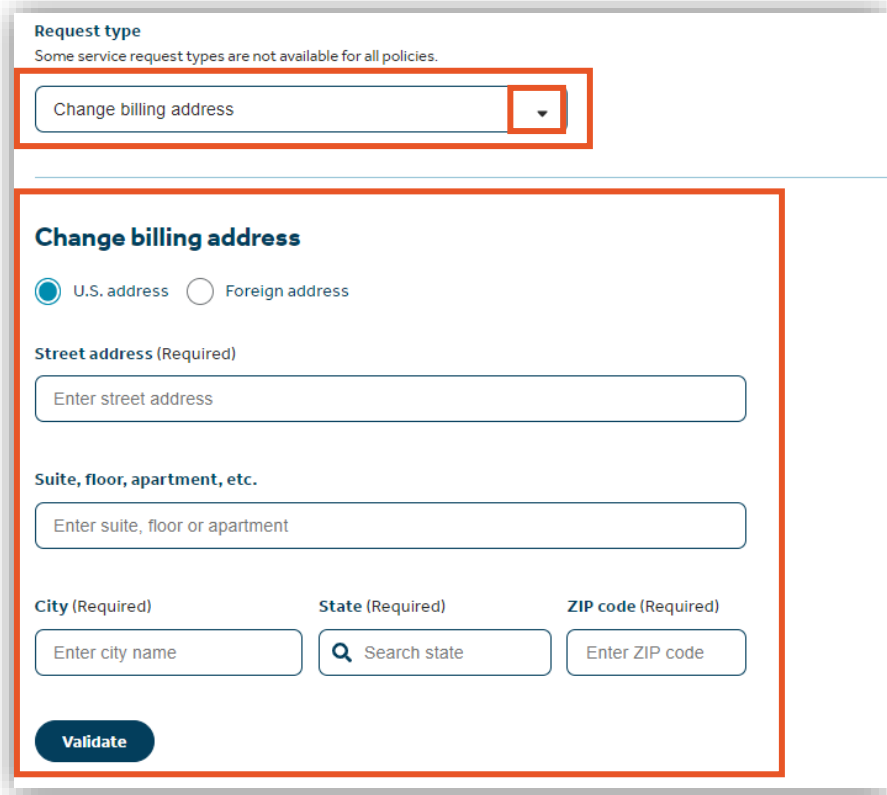
Select

- Change billing address
- Change of mode
- Policy loan
- Change name, owner, beneficiary, or address
- Trust certificate
- Dividend withdrawal, dividend option change, etc. (Form V167)

Client Manager – Service Request (Change billing address)

How To Guide: Guardian Online (GOL)

1. Select **Change billing address** from the drop down
2. Updates can be made under the billing address fields. Click **Validate** once completed.
3. Option to update **Producer Preferred contact information**
4. Click on Review to agree with the **Acknowledgements**



Request type
Some service request types are not available for all policies.

1 Change billing address

2 **Change billing address**

U.S. address Foreign address

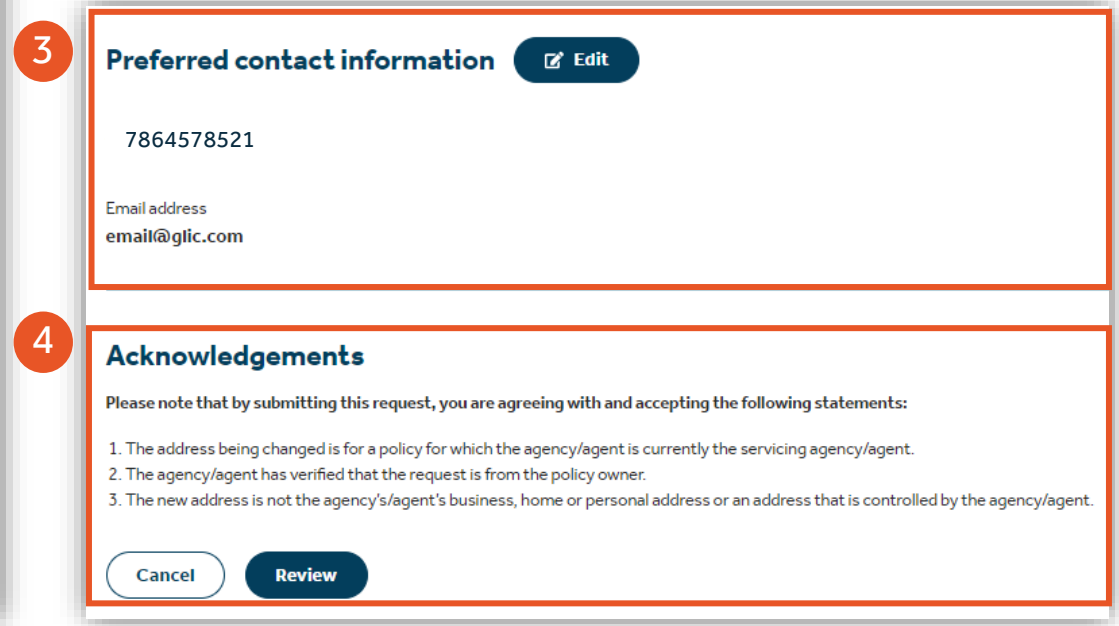
Street address (Required)
Enter street address

Suite, floor, apartment, etc.
Enter suite, floor or apartment

City (Required) State (Required) ZIP code (Required)

Enter city name Search state Enter ZIP code

Validate



3 **Preferred contact information** Edit

7864578521

Email address
email@glic.com

4 **Acknowledgements**

Please note that by submitting this request, you are agreeing with and accepting the following statements:

1. The address being changed is for a policy for which the agency/agent is currently the servicing agency/agent.
2. The agency/agent has verified that the request is from the policy owner.
3. The new address is not the agency's/agent's business, home or personal address or an address that is controlled by the agency/agent.

Cancel Review

Client Manager – Service Request (Change of mode)

How To Guide: Guardian Online (GOL)

1. Select **Change of mode** from the drop down
2. Click on the drop down to view and select option
3. Option to update **Producer Preferred contact information**
4. Click on **Review** to complete change.

Request type
Some service request types are not available for all policies.

1 Change of mode

2 Change of mode

New modal premium (Required)

Select

Annual

Semi-annual

Quarterly

Annual draft

Semi-annual draft

Monthly draft

Edit

3 Preferred contact information Edit

Phone number
7864578521

Email address
email@glic.com

4

Please note that by submitting this request, you are agreeing with and accepting the following statements:

1. The agency/agent has verified that the request is from the policy owner.
2. Bank Draft Authorization completed by account holder required for all draft options.
3. Quarterly draft is not available.
4. Review the Bank Draft Authorization form for available options.

Cancel Review

Client Manager – Service Request (Policy loan)

How To Guide: Guardian Online (GOL)

1. Select **Policy loan** from the drop down
2. Click on the drop down to view and select option under **Loan option**
3. Option to update **Producer Preferred contact information**
4. Click on **Review** to complete change.

Request type
Some service request types are not available for all policies.

1 Policy loan

Policy loan

Loan option (Required)

2 Select

- Maximum loan w/o lien
- Maximum loan w/o lien after deducting premium due
- Maximum loan with lien
- Maximum loan with lien after deducting premium due
- Premium payment loan (APL)
- Check amount
- Check amount after deducting payment due

Preferred contact information [Edit](#)

Phone number
7864578521

Email address
email@glic.com

3

Cancel **Review** 4

Client Manager – Service Request (Change owner/ beneficiary)

How To Guide: Guardian Online (GOL)

1. Select **Change owner/ beneficiary** from the drop down
2. Update **Producer Preferred contact information**
3. Click on **Review** to continue

The screenshot displays a service request form with three key areas highlighted by red boxes and numbered callouts:

- 1**: A dropdown menu under the heading "Request type" with the text "Some service request types are not available for all policies." The selected option is "Change owner/ beneficiary".
- 2**: The "Preferred contact information" section, which includes an "Edit" button with a pencil icon. Below the heading, the "Phone number" is listed as "7864578521" and the "Email address" is "email@glic.com".
- 3**: The "Review" button at the bottom of the form, positioned next to a "Cancel" button.

Client Manager – Service Request (Change owner/beneficiary)

How To Guide: Guardian Online (GOL)

4. Choose from the **Download options**
5. Select **Download forms**
6. Instructions and Guidelines are in pdf format.

Download forms

The following policies require a form for processing:

Policy	Owner name	Insured name
2123456	Eddie Smith	Eddie Smith

4 **Download options**

One form per policy

One form per owner (multiple policies)

5 **Download forms**

← Back

6

Guardian Instructions and Guidelines for Ownership or Beneficiary Change

Please read and follow the instructions carefully when submitting this form to prevent delay. All pages of the form must be returned to expedite processing. Note: This page is for your records and does not need to be returned.

Signatures
Please review the instructions located to the right of this page to ensure your request is not delayed.

General Information
Use this form to notify the Company of a change to an owner or beneficiary on an individual life insurance policy. Please print clearly using blue or black ink. Any corrections or changes to the form must be initialed and dated or we may not be able to accept your request. Such change will take effect when recorded by the Company using the date you signed the request. The change will not apply to any actions taken by the Company before the request is recorded. If you require additional space, attach additional pages with all required information including dates and signatures.

Please include the name, relationship to insured, social security number and date of birth of each person designated as an owner. The form must be signed and dated by the current owner and new owner. If the policy is collateral assigned, the signature of the collateral assignee and a corporate resolution is required. A clear copy of government issued identification is required for ownership changes for all variable life policies.

UTMA ownership requires an UGMA/UTMA Certification Form.

Changing owners may be a taxable event. The Company and its affiliates, subsidiaries, employees and agents do not provide legal, investment or tax advice. Tax laws and regulations are complex and subject to change. For information that is specific to your situation, consult your legal, investment or tax advisor to determine any tax consequences. The Company will not be responsible for any tax consequences arising from a change in ownership.

When the request involves a non-natural person(s), the Company reserves the right to request any documentation it deems satisfactory to evidence certain facts, including, but not limited to whether an entity is duly organized, is empowered to execute documents for ownership of the policy and that those signing have signatory authority.

The relationship of the beneficiary to the insured must be included.

All proceeds must add up to 100% in each beneficiary designation should total 1. Do not list over or under 100% of the proceeds in any given beneficiary designation section. If no percentages are listed in a beneficiary section, the beneficiaries will automatically have an equal share of the proceeds. When proceeds are split equally, the living beneficiaries in the same class would receive the proceeds of any named beneficiaries who are not living at the time of the insured's death, unless per stirpes designation is selected or unless otherwise provided.

When beneficiaries receive unequal shares, the owner or the estate of the owner will receive that portion of the proceeds in the event the named beneficiary is not living at the time of the insured's death, unless per stirpes designation is selected. When unequal percentages are selected in any of the beneficiary sections, you may not list any further beneficiaries on the form. For this type of request, please contact us so that a special form can be prepared.

Class Designation
In lieu of providing specific beneficiary names, the following class designations can be used:

- Children of the Insured
- Grandchildren of the Insured
- Insured's Estate
- Trustee Under the Insured's Last Will & Testament

*If the insured dies without a valid will, or if no trust is created within 90 days of the insured death, the proceeds of this policy will be paid to the owner or the owner's estate.

Corporation or Limited Liability Company (LLC)
Signature of officer, manager or member, including title, other than the insured is required. *

- Corporate Resolution listing names, titles and signatures of employees authorized to sign and transact business on behalf of the company. Corporate Resolution must be on corporate letterhead and be signed by President and/or Corporate Secretary. Or;
- Completion of Guardian's Certification of Corporate/Entity Resolution template.
- Corporate Resolution is required for the assignee on all ownership changes on policies that are collateral assigned.

*If the insured is the sole officer, manager or member, supporting documentation such as filed documents with the Secretary of State's office (listing the corporate officers and their titles) or a copy of the operating agreement, including any amendments, will be required.

Partnership
Signature of partner, including title, other than the insured is required.

Trust or Pension Plan
If the new owner is a trust, a Trust Certification form must be included with this request.

If the new owner is a qualified retirement plan, the beneficiary must also be the plan. A copy of page 1, 2 and all signature pages of the plan document must be submitted with a fully completed No Administrative Service Agreement Form.

Signatures of all trustees, unless one trustee has the authority to sign for the entire trust/plan, if one trustee can sign, be sure to include proof of authorization. Trustee changes require Trust Certification form and the Resignation and Appointment letters.

Community Property State
If you are married, reside in a community property state (AZ, CA, ID, LA, NV, NH, TX, WA, WI), and designate someone other than your spouse as your sole primary beneficiary, your spouse must sign. If not married and reside in a community property state, please check the box provided above the signature requirements.

If you are unsure if these laws apply to you, consult your own legal or tax advisor to determine whether a spousal signature is required on this form.

Irrevocable Beneficiary
The owner has the right to change beneficiaries except when an irrevocable designation applies to this policy.

Massachusetts Witness Signature Section
A disinterested party (anyone over 18 years of age and other than the owner, insured or beneficiary) must witness the signature of the owner when the owner or insured reside in Massachusetts. Only required for beneficiary changes.

UTMA/UGMA
UTMA/UGMA refers to a state's law that governs the transfer of title to life insurance proceeds to a Custodian to manage for a minor until the minor reaches an age permitted by law. Under the UTMA/UGMA of the state designated, the person designated will be custodian for the children named. We require the Custodian's full legal name (First, MI, Last, Suffix), Relationship to Insured, Minor's name, Date of Birth and Custodial State.

Power of Attorney
The attorney-in-fact or agent must sign in capacity as attorney-in-fact or agent. Provide a copy of the entire power of attorney document (if not previously submitted), and complete and submit an affidavit form if power of attorney document is more than 3 years old.

TITLE-OWNER/BENE (11-2021) 1

Client Manager – Service Request (Trust certificate)

How To Guide: Guardian Online (GOL)

1. Select **Trust certificate** from the drop down
2. Option to update **Producer Preferred contact information**
3. Click on **Review** to continue

1 Request type
Some service request types are not available for all policies.

Trust certificate

2 Preferred contact information [Edit](#)

Phone number
7864578521

Email address
email@glic.com

Cancel **Review** **3**

Client Manager – Service Request (Trust certificate)

How To Guide: Guardian Online (GOL)

4. Choose from the **Download options**
5. Select **Download forms**
6. The Trust Certification form is in pdf format.

Download forms

The following policies require a form for processing:

Policy	Owner name	Insured name
2123456	Eddie Smith	Eddie Smith

4 Download options

One form per policy

One form per owner (multiple policies)

5 [Download forms](#)

[← Back](#)

6

Guardian

THE GUARDIAN LIFE INSURANCE COMPANY OF AMERICA
 THE GUARDIAN INSURANCE & ANNUITY COMPANY, INC.
 BERKSHIRE LIFE INSURANCE COMPANY OF AMERICA
(Please check appropriate company. In this form, "the Company" is the insurer checked above.)

Mail to:
P.O. Box 981590
El Paso, TX 79998-1590

TRUST CERTIFICATION

1. Policy Information – Proposed Insured(s)/Insured(s)

Policy Number(s) 2079507

LIFE ONE _____ **LIFE TWO** _____
1. Name _____ 2. Name _____
First Middle Last First Middle Last

2. Trust Information

1. Name of Trust _____

2. a) Name(s) of Trustee(s) _____
b) Nature of the relationship between the Grantor(s) and the Trustee(s) _____
c) Duration of the relationship _____

3. Tax Identification Number of Trust _____
 Applied for (Check this box if you have applied for a number and are waiting for one to be issued. You have 60 days to submit a certified TIN in order to avoid backup withholding.)

4. Is this a Grantor Trust? Yes No
Please consult with a tax advisor to determine whether your Trust is a Grantor Trust (as described in Sections 671-679 of the Internal Revenue Code).
If "Yes", please provide: Grantor's TIN or SSN: _____ Grantor's Date of Birth: _____
Month Day Year

5. Transaction requests must be authorized by (Select one):
 Any one Trustee All Trustees A majority of Trustees

6. Who are the current Beneficiaries of the Trust? _____


7. a) Effective Date of Trust _____ b) Date Trust was signed/executed _____
Month Day Year Month Day Year

c) Situs of Trust: The Trust is subject to the laws of the State of _____

8. Address of Trust _____
Street No. & Name State No. City State Zip code

9. Did you retain an attorney to prepare the Trust document? Yes No (We will not contact the attorney without your written approval.)
If "Yes", provide name and address of attorney. If "No" provide name and address of person who provided Trust document.
Name of Attorney/Provider _____
Address of Attorney/Provider _____
Street No. & Name State No. City State Zip code

TRUST-CERT-2011 (9/14)


IMNB0014000560102

Client Manager – Service Request (Dividend option change, etc (Form V167 Admin))

How To Guide: Guardian Online (GOL)

1. Select **Dividend option change (Form V167 Admin)** from the drop down
2. Option to update **Producer Preferred contact information**
3. Click on **Review** to continue

The screenshot displays a service request form with three numbered callouts:

- 1**: A dropdown menu for 'Request type' is set to 'Dividend option change, etc (Form V167 Admin)'. Above it, a note states: 'Some service request types are not available for all policies.'
- 2**: The 'Preferred contact information' section, which includes an 'Edit' button and the following details:
 - Phone number: 7864578521
 - Email address: email@glic.com
- 3**: The 'Review' button at the bottom of the form, next to a 'Cancel' button.

Client Manager – Service Request (Dividend option change, etc (Form V167 Admin))

How To Guide: Guardian Online (GOL)

4. Choose from the **Download options**
5. Select **Download forms**
6. The **Life Insurance Policy Administration Form** is in pdf format.

Download forms

The following policies require a form for processing:

Policy	Owner name	Insured name
2123456	Eddie Smith	Eddie Smith

4 **Download options**

- One form per policy
- One form per owner (multiple policies)

5 **Download forms**

← Back

6

Guardian

THE GUARDIAN LIFE INSURANCE COMPANY OF AMERICA
THE GUARDIAN INSURANCE & ANNUITY COMPANY, INC.
BERKSHIRE LIFE INSURANCE COMPANY OF AMERICA
(Any insurer above, individually or collectively, is herein referred to as the "Company.")

Customer Service Office Visit guardianlife.com
P.O. Box 981590 Email IL.Solutions@glic.com
El Paso TX, 79998-1590 Call 1-888-GUARDIAN (1-888-482-7342)
Fax 610-807-2720

LIFE INSURANCE POLICY ADMINISTRATION FORM (Page 1 of 6)

Please print.

SECTION 1: Policy Owner/Life Insured Information

Policy number(s) 2123456

Policy owner(s) Eddie Smith

Policy insured(s) (Does not need to be filled out if policy owner(s) is/are the same.):
Eddie Smith

Policy owner(s) SSN/Tax ID: _____

Policy owner address: _____
Street City State Zip

Check if this is an address change (If this box is checked, any mailed correspondence for the policy number(s) listed in this section will be mailed to this address.)

Policy owner cell phone: _____ Policy owner email: _____

Submitted by: _____
Name Agency # Phone

SECTION 2: Dividend Option Change

Use this section to change the dividend option under your policy. Select one dividend option only.

- Paid in Cash (A)*
- Reduced Premiums – Excess Paid in Cash (B)* (Not available with all methods of payment)
- Accumulate & Earn Interest (C)
- Purchase Paid-Up Life Addition (D) (Not available on Term)
- Reduce Loan (U) (Not available on EMT or EMP Policies)

*For the two options above, check here to elect electronic funds transfer (EFT) in lieu of a paper check and complete section 9.

Note:

- Dividend option changes, including those which would result in a loss of One Year Term coverage, go into effect on the next policy anniversary date.
- Election of Dividend Options A, B, C, D, or U will terminate any existing One Year Term insurance and may reduce total death benefit.
- There may be additional dividend options available for your policy. Consult with your financial professional for eligibility and form/illustration requirements.

V167 ADMIN (4/23)

Client Manager – Service Request (Fund allocation of net annual premiums)

How To Guide: Guardian Online (GOL)

1. Select **Fund allocation of net annual premiums** from the drop down. It will only display on Variable Life policies.
2. Option to update **Producer Preferred contact information**
3. Click on **Review** to continue

The screenshot displays a service request form with three numbered callouts:

- 1**: A dropdown menu under the heading "Request type" with the text "Some service request types are not available for all policies." The selected option is "Fund allocation of net annual premiums (Variable Life only)".
- 2**: The "Preferred contact information" section, which includes an "Edit" button and the following details:
 - Phone number: 7864578521
 - Email address: email@glic.com
- 3**: The "Review" button at the bottom of the form, next to a "Cancel" button.

Client Manager – Service Request (Fund allocation of net annual premiums)

How To Guide: Guardian Online (GOL)

4. Choose from the **Download options**
5. Select **Download forms**
6. The form is in pdf format.

Download forms

The following policies require a form for processing:

Policy	Owner name	Insured name
S612322	Sarah Miller	Sarah Miller

Download options

One form per policy

One form per owner (multiple policies)

Download forms

[← Back](#)

6

Guardian

The Guardian Insurance & Annuity Company, Inc.
P.O. Box 26100
Lehigh Valley, PA 18001-2610

Owner: Sarah Miller Policy No. S612322 Date: / /
Insured (if other than owner): Sarah Miller Agency:

SECTION I. Allocation of Net Annual Premiums

Please indicate the percentage and name of the investment divisions to which all future net annual premiums should be allocated. Total percentages must be equal 100%. These allocations will apply until the Company is notified in writing to the contrary. Policyowners may have accumulations in NO MORE THAN 4 INVESTMENT DIVISIONS AT ANY ONE TIME. Receipt of the current Separate Account and Fund Trust(s) prospectus(es) is hereby acknowledged.

	TO: Investment Division
%	
%	
%	
%	

100 %

SECTION II. Transfer of Investment Base

Transfer some or all of the investment base under this policy from and to the Investment Divisions as indicated below.

Amount (\$, pct (%) or units)	From: Investment Division	To: Investment Division

Please note:

1. Policyowners may have accumulations in no more than four (4) funds or trust at any one time.
2. The amount transferred from any Investment Division will be the amount requested above or the total amount available in that division on the transfer effective date, whichever is less.
3. The Company reserves the right to limit the frequency of transfers to not more than one per thirty days.
4. Receipt of the current Separate Account and Fund/Trust(s) prospectus(es) is hereby acknowledged.
5. The transfer will be effective as of the date the request is received at the Company's address as indicated above.
6. No transfer will take effect before the end of the free look period.

Remarks or Special Instructions:

Executed at: _____ this _____ day of _____, 19 _____

Signature of Witness _____ Signature of Owner (insured if no other owner) _____

Signature of Assignee, if any, required _____

010643 (8/04)

Client Manager – Service Request (Fund allocation and transfer)

How To Guide: Guardian Online (GOL)

1. Select **Fund allocation and transfer** from the drop down. It will only display on Variable Life policies.
2. Option to update **Producer Preferred contact information**
3. Click on **Review** to continue

The screenshot displays a service request form with three numbered callouts:

- 1**: A dropdown menu for 'Request type' is set to 'Fund allocation and transfer (Variable Life only)'. A note above it states: 'Some service request types are not available for all policies.'
- 2**: The 'Preferred contact information' section, which includes an 'Edit' button and the following details:
 - Phone number: 7864578521
 - Email address: email@glic.com
- 3**: The 'Review' button at the bottom of the form, next to a 'Cancel' button.

Client Manager – Service Request (Fund allocation and transfer)

How To Guide: Guardian Online (GOL)

4. Choose from the **Download options**
5. Select **Download forms**
6. The form is in pdf format.

Download forms

The following policies require a form for processing:

Policy	Owner name	Insured name
S612322	Sarah Miller	Sarah Miller

4 Download options

One form per policy

One form per owner (multiple policies)

5 **Download forms**

[← Back](#)

6

The Guardian Insurance & Annuity Company, Inc. (GIAC)
 Administrative Address: P.O. Box 26125
 Lehigh Valley, PA 18017

**FUND TRANSFER/ALLOCATION CHANGE/
DOLLAR COST AVERAGING ELECTION**

POLICYOWNER: Sarah Miller INSURED(S) (if other than policyowner): Sarah Miller

Policy No:
S612322

All policyowners must complete section D and the appropriate sections listed below:

If you intend to TRANSFER VALUES DERIVED FROM PAST PREMIUMS, also complete section A.
 If you intend to CHANGE THE ALLOCATION OF FUTURE PREMIUMS, also complete section B.
 If you intend to ESTABLISH DOLLAR COST AVERAGING, also complete section C.

- The specific variable plan you purchased dictates the maximum number of allocation options that can be selected at any one time for current balances or future premium payments. Refer to the product prospectus for more information.
- The total allocation option percentages must equal 100% and each percent must be a whole number.
- The allocations requested will apply to all net premiums until such time as GIAC is notified to the contrary by either filing of a subsequent form 012134 (or reasonable facsimile) or by telephone pursuant to a valid Form 012296.
- The amount transferred from any allocation option is the lesser of the total amount requested or the total amount available in that allocation option on the effective date of the transfer.
- The minimum amount for transfers from any allocation option is the lesser of \$500 or the entire amount held in the allocation option. Transfers from the FRO are permitted once per policy year during the 30 day period following the policy anniversary. The transfer amount may not exceed the larger of \$2500 or 33 1/3% of the policy anniversary account value.
- GIAC reserves the right to charge for each transfer after the twelfth one in the policy year.
- GIAC reserves the right to limit the frequency of transfers to not more than one per thirty days.

SECTION A: TRANSFER OF EXISTING BALANCES:

COMPLETE EITHER PART I OR PART II. DO NOT COMPLETE BOTH PARTS.

PART I: SPECIFIC FUND TO FUND TRANSFERS

The undersigned policyowner requests a transfer of some or all of the current value under this policy from and to the Separate Account Divisions (funds) or Fixed-rate Option (FRO) as indicated. The funds and the FRO together are referred to as the "allocation options".

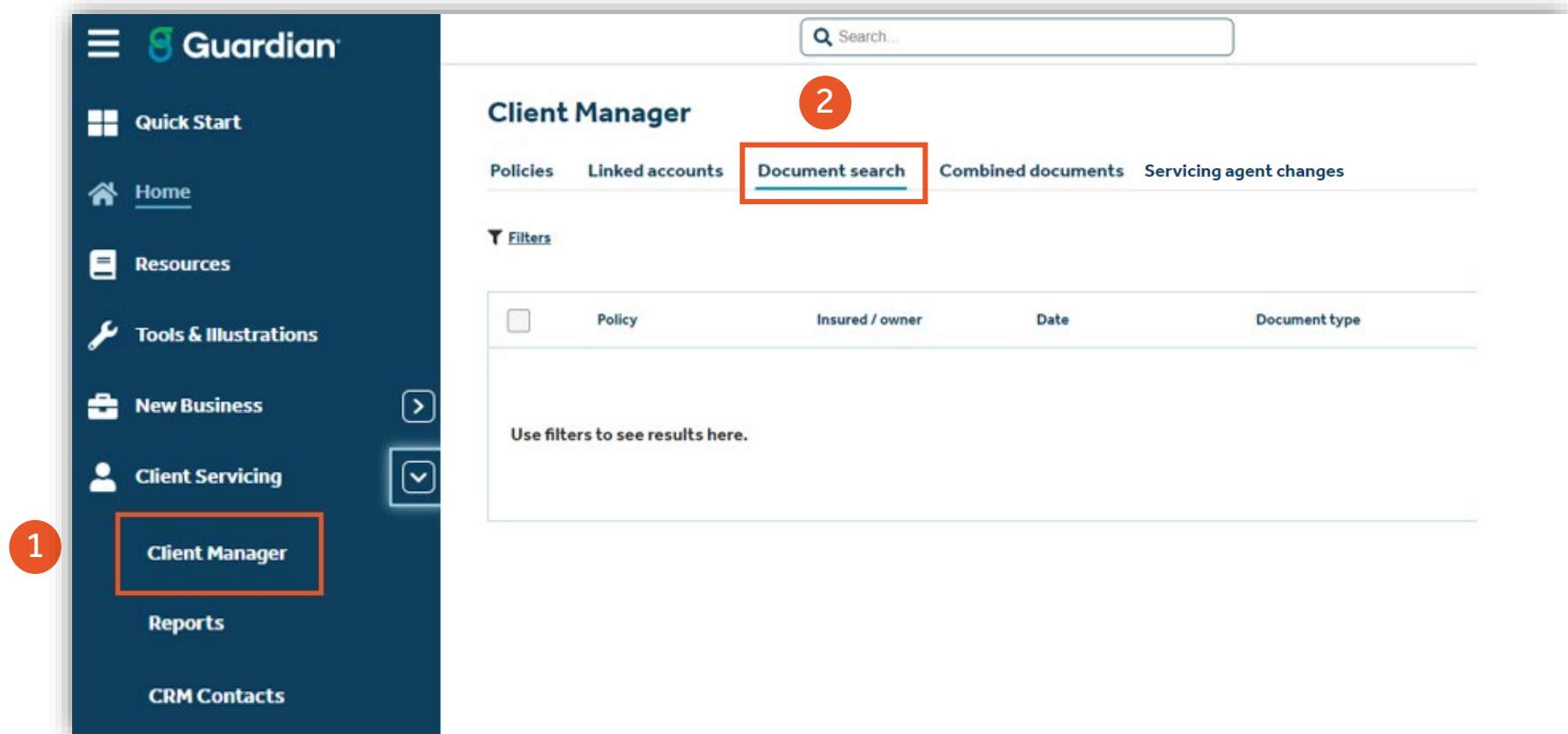
AMT(S) OR PCT(S)	FROM: SEPARATE ACCT. DIV. (FUND) OR FIXED-RATE OPTION (FRO)	TO: SEPARATE ACCT. DIV. (FUND) OR FIXED-RATE OPTION (FRO)	AMT(S) OR PCT(S)	FROM: SEPARATE ACCT. DIV. (FUND) OR FIXED-RATE OPTION (FRO)	TO: SEPARATE ACCT. DIV. (FUND) OR FIXED-RATE OPTION (FRO)

012134 (Rev. 5/2002)
Page 1 of 2

Client Manager – Document Search

How To Guide: Guardian Online (GOL)

1. To search for a document, select **Client Manager** on the left-hand navigation.
2. Click on the **Document search** tab.



Client Manager – Document Search

How To Guide: Guardian Online (GOL)

3. Click on **Filters**
4. Depending on access, ability to search by **My business** or **By agency**
5. Enter your **Agency**

The screenshot shows the 'Client Manager' interface with the 'Document search' tab selected. A search bar is at the top. Below it are navigation tabs: Policies, Linked accounts, Document search, Combined documents, and Servicing agent changes. A 'Filters' button is highlighted with a red box and a '3' callout. To the right, a 'Filters' sidebar is open, with the 'Access' section highlighted by a red box and a '4' callout. The 'Access' section has two radio buttons: 'My business' and 'By agency', with 'By agency' selected. Below this is an 'Agency (Required)' search field with a '5' callout and a 'Clear' link. Other filter sections include 'Producer (Required)', 'Product type' (with 'Life' selected), 'Document type (Required)' (with 'Annual Benefit Statement' selected), and 'Posting date' (with 'From' and 'To' date pickers).

Client Manager

Policies Linked accounts **Document search** Combined documents Servicing agent changes

3 **Filters** 5

<input type="checkbox"/>	Policy	Insured / owner	Date	Document type
Use filters to see results here.				

Filters

Access

My business

By agency

4

Agency (Required) Clear

5

Search...

Producer (Required) Clear

Search producers

Product type

Life

Annuity

Document type (Required) Clear

Annual Benefit Statement

Posting date Clear

From (Required)

08/05/2023

To (Required)

11/05/2023

Didn't find what you needed?

Phone icon, Help icon, Chat icon

Client Manager – Document Search

How To Guide: Guardian Online (GOL)

6. Only those producers from the agency selected will appear in this field.
7. Product type – Either Life or Annuity. Only specific document types will display depending which one you chose.

The screenshot shows the 'Filters' sidebar with the following settings:

- Access:** My business, By agency
- Agency (Required):** Search field with a magnifying glass icon and a 'Clear' link.
- Producer (Required):** Search field with the text 'Search producers' and a 'Clear' link.
- Product type:** Life, Annuity. The 'Life' option is highlighted with a red box.
- Document type (Required):** Search field with the text 'Annual Benefit Statement' and a 'Clear' link.
- Posting date:** 'From (Required)' field with '08/05/2023' and a calendar icon; 'To (Required)' field with '11/05/2023' and a calendar icon.

6

7

The dropdown menu for 'Document type (Required)' is open, showing a search field with 'Annual Benefit Statement' and a list of document types:

- Annual Benefit Statement
- Conversion Privilege Expiry
- Lapse Notice
- Payment Due Notice
- Payment Overdue Notice
- Policy Documents

The dropdown menu for 'Product type' is open, showing two options:

- Life
- Annuity

Below it, the 'Document type (Required)' search field contains 'Anniversary'.

The dropdown menu for 'Document type (Required)' is open, showing a search field with 'Anniversary' and a list of document types:

- Anniversary
- Confirm
- Combined Quarterly
- Quarterly
- Replacement Letters
- RMD Letters

Client Manager – Document Search

How To Guide: Guardian Online (GOL)

- Posting date can be selected. It can only go back 3 years from the current date. Click **Apply** for results.
- Results display with **Document type** as clickable link to download to pdf.

Filters ×

Access

My business

By agency

Agency (Required) Clear

Producer (Required) Clear

Product type

Life

Annuity

Document type (Required) Clear

Posting date Clear

From (Required)

To (Required)

Apply

<input type="checkbox"/>	Policy ▲	Insured / owner ↕	Date ↕	Document type ↕	Description ↕
<input type="checkbox"/>	4235678	Sarah Smalls	07/05/2022	Annual Benefit Statement	-
<input type="checkbox"/>	4678333	Matt Smalls	05/10/2022	Annual Benefit Statement	-

Client Manager – Combined documents

How To Guide: Guardian Online (GOL)

1. Select documents you would like to combine under the **Document search** tab.
2. Click on **Combine documents**

The screenshot shows the Guardian Client Manager interface. On the left is a dark blue sidebar with navigation options: Quick Start, Home, Resources, Tools & Illustrations, New Business, Client Servicing, Client Manager, Reports, CRM Contacts, Inforce Illustrations, Track Inforce Requests, Performance, and Book of Business. The main content area is titled 'Client Manager' and has tabs for Policies, Linked accounts, Document search (selected), Combined documents, and Servicing agent changes. Below the tabs are filter options: Access, Product type: Life, Document type: Annual Benefit Statement, From: 08/06/2023, To: 11/06/2023, and a Clear Filters link. A table lists documents with columns for checkboxes, Policy, Insured / owner, Date, Document type, and Description. Two rows are highlighted with red boxes and numbered 1 and 2. Row 1 shows a checked checkbox for policy 4235678, insured Sarah Smalls, dated 10/12/2023, with document type Annual Benefit Statement. Row 2 shows a checked checkbox for policy 4678333, insured Matt Smalls, dated 10/12/2023, with document type Annual Benefit Statement. A 'Combine documents' button is highlighted with a red box and numbered 2.

	Policy	Insured / owner	Date	Document type	Description
1	4235678	Sarah Smalls	10/12/2023	Annual Benefit Statement	-
2	4678333	Matt Smalls	10/12/2023	Annual Benefit Statement	-
			11/03/2023	Annual Benefit Statement	-

Client Manager – Combined documents

How To Guide: Guardian Online (GOL)

3. Enter name of the document. Click **Save**
4. A message pops up stating that the request has been received. Click **Done**

3


Document name

Enter name

Family_Small_1

Cancel Save

4

 **Your request has been submitted. Please check combined documents tab for status and to access your document once completed.**

Done

Client Manager – Combined documents

How To Guide: Guardian Online (GOL)

5. Click on **Combined documents** tab to view all of your combined documents.
6. The latest document saved displays with “Requested” status. The process to combine documents takes overnight to complete.

Client Manager

Search...

Policies Linked accounts Document search **Combined documents** Servicing agent changes

From date (Required) Clear To date (Required) Clear

10/06/2023 11/06/2023 Apply

Date	Document name	Status
11/06/2023	Family_Smalls_1	Requested
11/03/2023	↓ Patrick_james_14	Completed

Showing 1 - 2 of 2 results

Requests are available for 30 days - maximum 50 documents per request.

Statuses

- Requested - Request has been submitted.
- Processing - Document is being created. Please check back to access the document once completed.
- Completed - Select document name to access combined document
- Error - Part of the process failed, please try your request again later.

NEW – icons implemented in status field.

- Requested
- Processing
- Completed

Client Manager – Combined documents

How To Guide: Guardian Online (GOL)

7. When the status displays **Completed** click on document to retrieve combined pdf documents.

8. All combined documents are available for 30 days. They will be automatically deleted afterwards.

The screenshot shows the 'Client Manager' interface with the 'Combined documents' tab selected. The 'Downloads' folder in the top right contains a file named 'COMBINED_DOCUMENT (1).pdf' with an 'Open file' link. The main table lists documents with columns for Date, Document name, and Status. The document 'Family Smalls 1' is highlighted with a red box and a red circle with the number 7. An arrow points from this document to the download icon in the top right corner. A red box with the number 8 highlights a note: 'Requests are available for 30 days - maximum 50 documents per request.'

Date	Document name	Status
11/06/2023	Family Smalls 1	Completed
11/03/2023	Patrick james 14	Completed

Showing 1 - 2 of 2 results

8 Requests are available for 30 days - maximum 50 documents per request.

Statuses

- Requested - Request has been submitted.
- Processing - Document is being created. Please check back to access the document once completed.
- Completed - Select document name to access combined document
- Error - Part of the process failed, please try your request again later.

Client Manager – Servicing Agent Changes

How To Guide: Guardian Online (GOL)

Process a Traditional Life Policy servicing agent change where a new agent is located within the same agency as the previous agent.

1. Access to make changes by selecting **Client Manager** on the left-hand navigation under Client Servicing.
2. Click on the **Servicing agent changes** tab

The screenshot displays the Guardian Client Manager interface. On the left, a dark blue navigation menu contains several options: Quick Start, Home, Resources, Tools & Illustrations, New Business, Client Servicing, Client Manager (highlighted with a red box and a '1' in a circle), Reports, and CRM Contacts. The main content area is titled 'Client Manager' and features a search bar at the top. Below the search bar, there are several tabs: Policies, Linked accounts, Document search, Combined documents, and Servicing agent changes (highlighted with a red box and a '2' in a circle). The 'Servicing agent changes' section includes a description: 'Use Servicing Agent Changes to reassign one traditional life policy or a group of traditional life policies to a new Servicing Agent by selecting the Reassign button or by running an Orphan Policy report.' Below this, there are filters for Agency and Reports, a 'Clear Filters' button, and a 'Reassign' button. At the bottom, there is a 'Pending changes report' table with columns for Remove, Date, Policy, Writing agent, Current servicing agent, New servicing agent, Current agency, and New servicing agency.

Only those who have access to make Servicing agent changes will see the **Servicing agent changes** tab.

Client Manager – Servicing Agent Changes

How To Guide: Guardian Online (GOL)

3. Click on **Reassign** found within the **Servicing agent changes** tab.

The screenshot shows the 'Client Manager' interface with the 'Servicing agent changes' tab selected. A search bar is at the top. Below the navigation tabs, there is a section titled 'Servicing agent changes' with a brief description. A 'Filters' section is visible, showing 'Agency' and 'Reports: Pending changes report'. A red circle with the number '3' highlights the 'Reassign' button. Below this is a 'Pending changes report' table with columns: Remove, Date, Policy, Writing agent, Current servicing agent, New servicing agent, Current agency, and New servicing agency.

Client Manager – Servicing Agent Changes

How To Guide: Guardian Online (GOL)

Only changes to servicing agent can be made. Changes to writing agent is **not** possible.

4. Reassign by selecting **Policy number**, **Current servicing agent**, **Current writing agent** or **Current servicing agent and writing agent**. Each selection requires to enter slightly different required information.

The image displays four screenshots of the 'Servicing agent reassignment' form, illustrating different reassignment methods. A red circle with the number '4' is positioned to the left of the first screenshot. Each screenshot shows the 'Reassign by' section with a selected option highlighted by a red box. Below this, a dashed red box indicates the required input fields for that method. The 'Agency', 'New producer name', and 'New writing code' sections are consistent across all methods.

- Method 1: Policy number**
 - Required field: Policy number (7-15 characters / digits)
- Method 2: Current servicing agent**
 - Required field: Current servicing agent (8 characters / digits)
- Method 3: Current writing agent**
 - Required field: Current writing agent (8 characters / digits)
- Method 4: Current servicing agent and writing agent**
 - Required fields: Current servicing agent (8 characters / digits) and Current writing agent (8 characters / digits)

Each form includes 'Agency (Required)', 'New producer name (Required)', and 'New writing code (Required)' fields, each with a search icon and a 'Clear' link. The 'New writing code' field is a dropdown menu with the placeholder text 'Search writing code'. At the bottom of each form are 'Cancel' and 'Submit' buttons.

Client Manager – Servicing Agent Changes

How To Guide: Guardian Online (GOL)

- Once all the information has been entered (for this example -policy number, agency, producer name and writing code). Click **Submit**
- Changes are reflected under the **Pending changes report**. If this change is made in error, ability to delete this change in pending status. The change takes overnight to reflect the change in the system. At that time, it will disappear from the **Pending change report** list.

Servicing agent reassignment

Reassign by

Policy number

Current servicing agent

Current writing agent

Current servicing agent and writing agent

Policy number (Required) [Clear](#)

1234567

Select new servicing agent information

Agency (Required) [Clear](#)

Green Agency

New producer name (Required) [Clear](#)

Jason Smith

New writing code (Required) [Clear](#)

00088997

00057571

[Cancel](#) [Submit](#) **5**

6

Client Manager

[Policies](#) [Linked accounts](#) [Document search](#) [Combined documents](#) [Servicing agent changes](#)

Servicing agent changes


Use Servicing Agent Changes to reassign one traditional life policy or a group of traditional life policies to a new Servicing Agent by selecting the Reassign button or by running an Orphan Policy report.

Filters

Agency: Green Agency Reports: Pending changes report [Clear Filters](#)

[Reassign](#)

Pending changes report

Remove	Date	Policy	Writing agent	Current servicing agent	New servicing agent	Current agency	New servicing agency
	02/09/2024	1234567	000AB321	000A2311	0006Y666	00B3	0066

Client Manager – Servicing Agent Changes

How To Guide: Guardian Online (GOL)

1. Click on **Filters** to find 3 different reports that can be pulled within the Servicing Agent Changes tab.
 - **Pending changes report** – lists the servicing agent changes currently being processed. This report also defaults on the landing page of the **Servicing agent changes** tab.
 - **Orphan policy report** – lists the policies that do not have a valid current servicing agent.
 - **Transaction history report** – lists the servicing agent changes that have been processed for the selected agency in the past. Policies processed for a specific producer on a specific date are available. Report can be printed.

Client Manager

Policies Linked accounts Document search Combined documents Servicing agent changes

Servicing agent changes

Use Servicing Agent Changes to reassign one traditional life policy or a group of traditional life policies to a new Servicing Agent by selecting the Reassign button or by running an Orphan Policy report.

1 **Filters**

Agency: Reports: Pending changes report [Clear Filters](#)

Reassign

Pending changes report

Remove	Date	Policy	Writing agent	Current servicing agent	New servicing agent	Current agency	New servicing agency
	02/09/2024	1234567	000AB321	000A2311	0006Y666	00B3	0066

Client Manager – Servicing Agent Changes

How To Guide: Guardian Online (GOL)

2. Enter your **Agency**
3. Select between three different reports: **Pending changes report**, **Orphan policy report**, or **Transaction history report**.
4. Click **Apply**

The screenshot displays the 'Client Manager' interface for 'Servicing agent changes'. The main content area shows a 'Reassign' button and a 'Pending changes report' section. The 'Filters' sidebar on the right is expanded, showing the following elements:

- Agency (Required)**: A search input field with a magnifying glass icon, highlighted by a red box and the number 2.
- Reports**: Three radio button options: 'Pending changes report' (selected), 'Orphan policy report', and 'Transaction history report', highlighted by a red box and the number 3.
- Date**: Two date input fields labeled 'From (Required)' and 'To (Required)', highlighted by a dashed blue box. An arrow points from this box to a callout: *Only the Transaction history report requires a date range.*
- Apply**: A dark blue button at the bottom of the sidebar, highlighted by a red box and the number 4.

Client Manager – Servicing Agent Changes

How To Guide: Guardian Online (GOL)

Pending change report:

Client Manager

Policies | Linked accounts | Document search | Combined documents | **Servicing agent changes** | Grant access

Servicing agent changes

Use Servicing Agent Changes to reassign one traditional life policy or a group of traditional life policies to a new Servicing Agent by selecting the Reassign button or by running an Orphan Policy report.

Filters

Agency: | Reports: Pending changes report | [Clear Filters](#)

[Reassign](#)

Pending changes report

Remove	Date	Policy	Writing agent	Current servicing agent	New servicing agent	Current agency	New servicing agency
	2/9/2024	1234567	00AB321	00A2311	006Y666	00B3	0066

Orphan policy report:

Client Manager

Policies | Linked accounts | Document search | Combined documents | **Servicing agent changes**

Servicing agent changes

Use Servicing Agent Changes to reassign one traditional life policy or a group of traditional life policies to a new Servicing Agent by selecting the Reassign button or by running an Orphan Policy report.

Filters

Agency: | Reports: Orphan policy report | [Clear Filters](#)

[Reassign](#)

Orphan policy report

Agent name	Agent code	Agent type	Policy
Mike Miller	000Y222	Writing agent	1234567

Click the hyperlink will direct to page to make the servicing agent change for all policies for this agent code .

Click the hyperlink will direct to page to make the servicing agent change for this policy .

Transaction history report:

Transaction history report

Producer	Writing code	Date	Policy count
Ben Davis	000Y2222	01/27/2003	3

New clickable policy count for additional info.

Transaction details for Ben Davis on date 1/30/2024

Insured	Policy
Sammy Bell	4011111
Ernie Eye	4122222
Sun Valentine	4133337

[Close](#)

Client Manager – GOM Reports

How To Guide: Guardian Online (GOL)

1. Select the **Client Servicing** filter on the left-hand landing page
2. GOM reports are found under **Reports**

The screenshot displays the Guardian Client Manager interface. On the left is a dark blue navigation sidebar with the Guardian logo at the top. The sidebar contains several menu items: 'Quick Start', 'Home', 'Resources', 'Tools & Illustrations', 'New Business', 'Client Servicing', 'Client Manager', 'Reports', 'CRM Contacts', 'Inforce Illustrations', and 'Track Inforce Requests'. The 'Client Servicing' item has a red circle with the number '1' next to it, and a dropdown arrow icon is highlighted with a red box. The 'Reports' item is highlighted with a red box and has a red circle with the number '2' next to it. At the top right of the main content area is a search bar with the placeholder text 'Search...'. Below the search bar is the heading 'Reports' and a sub-heading 'GOM reports'. Underneath is a 'Filters' section. A table with the following columns is visible: 'GOM draft', 'Draft type', 'Draft date', 'GOM control number', 'Total amount', 'Debit account', 'Bank name', 'Branch', 'Routing number', and 'Payor name'. Below the table, the text 'Use filters to see results here.' is displayed. A horizontal scrollbar is visible at the bottom of the table area.

Client Manager – GOM Reports

How To Guide: Guardian Online (GOL)

3. Click the **Filters**
4. Selecting product: **Disability** displays filter for **Search by** policy or APP, PAC, or GOM #. Enter required number.
5. Selecting product: **Life** displays filter for **Report type** (3 reports), able to **Search by** policy or GOM number, and **Draft date**.

GOM reports

3 **Filters**

GOM draft	Draft type	Draft date	GOM control number	Total amount	account
Use filters to see results here.					

4 **Filters**

Product

Life

Disability, including life pre-merger

Search by

Policy

APP, PAC or GOM number

Policy number (Required) [Clear](#)

Enter policy number

Apply

5 **Filters**

Product

Life

Disability, including life pre-merger

Report type

GOM premium draft history

GOM loan repayment history

Current GOM bank and payor report

Search by

Policy

GOM control number

Policy number (Required) [Clear](#)

Enter policy number

Draft date [Clear](#)

From (Required)

08/07/2023

To (Required)

11/07/2023

Apply

Client Manager – GOM Reports

How To Guide: Guardian Online (GOL)

6. Retrieve **GOM premium draft history** when filtering for a policy number.

Example:

Filters

Product

Life

Disability, including life pre-merger

Report type

GOM premium draft history

GOM loan repayment history

Current GOM bank and payor report

Search by

Policy

GOM control number

Policy number (Required) [Clear](#)

3888888

Draft date [Clear](#)

From (Required)

8/02/2016

To (Required)

11/07/2023

Apply

6

GOM premium draft history

GOM draft	Draft type	Draft date	GOM control number	Total amount	Debit account	Bank name	Branch	Bank account	Routing number	Payor name
GOM Premium Draft	EFT	01/16/2018	3888888	\$160.73	Checking	JP MORGAN CHASE	-	XXXX1234	XXXX4444	Sally Smith
GOM Premium Draft	EFT	12/15/2017	3888888	\$160.73	Checking	JP MORGAN CHASE	-	XXXX1234	XXXX4444	Sally Smith

Questions?

A thick, hand-drawn style orange brushstroke underline that tapers at both ends, positioned beneath the word 'Questions?'.

Looking for document or general questions on GOL? Contact: gol_redesign@glic.com

Technical issues or questions: Call the Agency Support Center at 1-800-499-8820