

SmartOffice

Carrier Data Download Request Form

Please complete this form and send it to SmartOffice at dxosupport@ebix.com.

Carrier Name: John Hancock*

Please indicate the types of information you would like to receive from the carrier specified above. Select all that apply.

Pending & New Business

Legacy Inforce (Coming Soon)

Provide a recent sample policy number expected to appear on feed(s): _____

I authorize you to deliver download information associated with the applications I have submitted to your company for underwriting.
Please deliver this information to Ebix, Inc., for subsequent delivery to my SmartOffice agency management solution.

Approved by: _____ Date: _____

Agency/Agent: _____

City/State: _____ ZIP: _____

Contact Name: _____ Phone: _____

E-mail: _____

Last four digits of TIN/SSN (REQUIRED): _____

SmartOffice Office Name (REQUIRED): _____

***Note to advisors signing up for the John Hancock feed:** Some life policy data sent by John Hancock may be incompatible with SmartOffice. This may prevent updates from being delivered for certain policies.