

HOW TO SUBMIT BUSINESS

Through Secure Email

2020/2021

If you need any assistance with Secure Email, or have any questions in general, please don't hesitate to reach out to our Support Team at 1-(800)-772-6881 or email support@pfsinsurance.com.

IF YOU HAVE AN ACCOUNT

- Log in to www.pfsinsurance.com.
- Under “Services” select “Secure Email”.
- Select the “Start Now” button.
- Log in and proceed.

IF YOU ARE NOT REGISTERED

- Log in to www.pfsinsurance.com
- Under “Services” select “Secure Email”.
- Select the “Start Now” button.
- Click on the “Register” button under “New to Secure Email?”
- Fill out your email address and desired password.
- A link will be sent to the provided email to activate your new account.
- Once logged in to the inbox, click “Compose” to send a new email.
- From the drop-down box, select an option (see provided chart to find which to select.)
- Add a subject line, (i.e. a client’s name, carrier, product, etc.)
- Add the desired attachment, (i.e. enrollment form, application, or contract.)
- Add any desired notes in the body of the email.
- Click “Send” at the top of the screen.

IF YOU ARE SENDING

USE	FOR
Enrollments/ New Business	Medicare Supplements/ Medicare Advantage/ Part D/ Ancillary Health
Health Support	All correspondence related to Medicare Supplement, Medicare Advantage, Part D, and Ancillary Health.
Life New Business	All Life New Business products, Long- and Short- Term Care, and Annuity.
Life Sales	All correspondence related to Life, Long- and Short- Term Care, and Annuity.
Sales	Any sales items that have any HIPPA or personal related information.
Licensing	All licensing and contracting.
Commissions	All commission requests or inquiries that contain HIPPA information.