

# NATIONWIDE LIFE PROCESS



**Some exciting new changes!**  
**Effective March 3rd, 2025, your firm will be direct to the carrier.**

**Do you know what that means for you?**

It means you can reach out to Nationwide's designated Sales Support Team, and you will have your own New Business Case Advocate assigned to your pending applications moving forward! Your advocate will support your case and help you resolve issues pertaining to it.

**Please be sure to review the process below to ensure your cases run smoothly as we implement this change.**

**IMPORTANT: To Accurately Submit Applications for This Program.**

- All Applications **MUST** be submitted through Advisor HQ to ensure they are coded correctly at Nationwide. Not submitting through Advisor HQ could cause coding issues and delays at Nationwide.
- See [Advisor HQ Instructions for eApplications](#).

**ILLUSTRATION or CASE DESIGN Help:**

- Call [Nationwide's Life Sales Support by Region](#).
- The turnaround time is same day to 24 business hours.

**APPLICATION PENDING TRACKING AND REQUIREMENTS:**

- For best practice, status updates should be reviewed through MyTracker at [Nationwidefinancial.com](#). All Advisors have access to MyTracker through Nationwide's website.
- Once your application is entered at Nationwide, you will see your pending case assigned advocate through MyTracker.
- Need a form? Open your case in MyTracker and blank forms can be found by clicking the "Get Blank Forms" button.
- All forms need to be uploaded through the carrier's website at [Nationwidefinancial.com](#). You can open your case online and click the "respond" button to [upload the form](#).

**COMMUNICATION:**

- All calls for status updates or questions should be made to your Nationwide Advocate assigned to your pending case.
- To communicate with your assigned advocate, please click on their link through Nationwide's MyTracker.

**Case Issues UNRESOLVED with Nationwide should be handled as follows:**

- First try to resolve with your assigned Nationwide Case Advocate.
- Still having difficulties resolving your issue? Contact Quantum's Life New Business team by emailing [LifeNBTeam@thequantum.com](mailto:LifeNBTeam@thequantum.com).

*When in doubt, reach out to Quantum's Life New Business Team [LifeNBTeam@thequantum.com](mailto:LifeNBTeam@thequantum.com)*

**DISCOVER THE POSSIBILITIES | THEQUANTUM.COM | 800.440.1088**

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