

CSI eApplications

easy, editable, electronic

Chubb's electronic, editable applications (eApplications) with electronic signatures (eSignatures) couldn't be easier. Just follow these step-by-step instructions.

STEP 1 – **Select** the application you need.*

- Go to www.chubb.com and select “Forms & Applications.”
- Select “Editable New Business Application” or “Editable Renewal Application” from Form Type drop-down menu.
- Enter additional search criteria as necessary and click “Search.”
- Select the appropriate eApplication by clicking on its title.

STEP 2 – **Save** the eApplication to your computer.

- Read the instructions and click “I Agree.”
- Click the disk icon to save the eApplication.
- Enter your own file name and click “Save.”

STEP 3 – **Send** the eApplication to your customer.

- Email the eApplication to your client.
- Include a copy of the CSI eApplication Customer Best Practices and FAQ document and the eSignature instructions for your client's reference in completing the eApplication.

STEP 4 – **Your client completes** the eApplication.

- Opens and completes the eApplication electronically.
- Signs the eApplication electronically using the eSignature feature.
- Saves it to his/her computer.
- Emails a copy of the completed application to you (along with any appropriate attachments).

STEP 5 – **Submit** the eApplication to you local Chubb branch.

- Review the eApplication: Is it complete, including electronic signatures?
- Save a copy to your computer for future reference.
- Email the completed application and any attachments to the branch mailbox at your local Chubb office.

For assistance and for more information, please refer to Chubb's Agent/Broker Best Practices and Frequently Asked Question document available on www.chubb.com.

**Check our Web site regularly to ensure you have the most up-to-date versions of our eApplications.*



Chubb Group of Insurance Companies

