

AGENT INFORMATION

Name _____

EF# _____

PLEASE COMPLETE ALL CARRIER CONTRACTING IMMEDIATELY

CARRIER CONTRACTING CHECKLIST

Foresters Financial

- Open email sent from SuranceBay
- Complete information for Corebridge
- Submit contracting

Americo

- Open email sent from SuranceBay
- Complete information for Americo
- Submit contracting

Mutual of Omaha

- Open email sent from SuranceBay
- Complete information for Mutual of Omaha
- Submit contracting

American Amicable (not through SuranceBay/SureLC system)

- Email sent from onboardingspecialist@theodoreagency.com
- Check SPAM folder if you can't find the email
- Open email and click link
- Click 'Get Started Here' button
- Complete information for American Amicable
- Submit contracting

GPM (not through Surancebay/SureLC system)

- Login to your Equis Dashboard
- Click GPM dashboard on left hand menu
- Click GPM life contracting orientation
- Then click start
- If the GPM dashboard is not showing up on your Equis dashboard, use this link: [Click GPM life contracting orientation](#)
- The orientation should take about 30 minutes
- You will receive a certificate after completion
- Email the certificate to your manager and they will request that you are contracted with GPM
- Check SPAM for GPM contracting
- Complete information for GPM
- Submit contracting

Common Questions When Completing Your SureanceBay Emails

- Commissions should be paid DAILY.
- You should be paid ADVANCED commissions (not AS EARNED)
- Who orders paramedical exams? "Agent"
- Who is my beneficiary: This is required so that if you die before commissions are paid, the commissions will be paid to your beneficiary. Enter your Spouse or another family member.
- Are you submitting new business or a new application? "NO"
- How much business do you plan on submitting? \$25,000 to \$200,000 (you decide!)
- Will you be selling LTC (long-term care) Rider? "NO"

Carriers	Date you signed your SureLC/Suran cebay	Received writing numbers?
Foresters		
Americo:		
Mutual of Omaha:		
American Amicable:		
GPM:		
ETHOS:		

Make sure you have filled out the carrier contracting checklist and texted it to your manager!