

CARRIER CONTRACTING CHECK LIST

Print this document and follow instructions below:

After your Carrier Contracting Profile has been submitted and approved, you will receive emails from Surancebay for each insurance carrier. You must open each email and confirm your contracting information for each carrier.

As you complete each request, write in the date completed in the table below in the column **“Date Surancebay Emails Completed”** and then **take a photo and text to your manager.**

We only need this “Date” column completed before texting to your manager.

****After you complete the Surancebay emails, you can start selling ASAP! You do not need to wait for writing numbers from the insurance carriers to start selling in most states (review pre-appointment). START SELLING NOW !!**

Carrier Name	Date Surancebay Emails Completed	Writing #	Pre-Appointment	Notes/Comments
AIG – American General American International Group				* Requires E & O to be contracted
Americo				* Requires E & O to be contracted
CFG - Columbian Financial Group				
Foresters Financial				
GPM – Government Personnel Mutual				> GPM does not use Surancebay. You will receive an email directly from GPM.
Great Western				
Mutual of Omaha / United of Omaha				
Transamerica				
Other:				
Other:				
Other:				
Other:				

**** Review Pre-Appointment with your manager**

Agent Name: _____ Date: _____ Equis Agent #: EF _____

Resident State: _____

_____ Yes, I have E&O Insurance

_____ No, I do not have E&O Insurance