

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 SureLC/Surancebay for each insurance carrier. You must open each email and confirm your contracting information for each carrier. Some carriers may use a different “Contracting System” other than SureLC/Surancebay.

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 SureLC/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/Contracting Emails Completed by Agent	Have you been previously contracted with this Carrier?	Writing #	Pre-Appointment	Notes/Comments
AIG – American General American International Group					Requires E & O to be contracted Pre-Appointment Request by Mgr
Americo					Requires E & O to be contracted
CFG - Columbian Financial Group					Paper applications only for first application
Foresters Financial					
GPM – Government Personnel Mutual	See Notes				GPM does not use Surancebay. You will receive an email directly from GPM’s contracting system.
Great Western / Wellabe					
Mutual of Omaha / United of Omaha					
Transamerica					
Other: Accendo (CVS)					Pre-Appointment Request by Mgr
Other: American Amicable					
Other: Gerber					
Other: Royal Neighbors					
Other:					

* Please indicate above if you have been previously CONTRACTED with any of our carriers.

**Review Pre-Appointment with your manager.

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

Did you have your Life Insurance License prior to joining Equis: YES or NO

Resident State: _____

_____ Yes, I have E&O Insurance

_____ No, I do not have E&O Insurance