

CARRIER CONTRACTING CHECK LIST

****Complete the check list and then take a photo and text to your manager****

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 the request for each carrier, write in the date completed below.

After you have completed all of the contracting requests through Surancebay, take a photo of this document and text 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. START SELLING NOW !!**

Carrier Name	Date Completed	Notes/Comments
Foresters Financial		
CFG - Columbian Financial Group		
Americo		* Requires E & O to be contracted
GPM – Government Personnel Mutual		> GPM does not use Surancebay. You will receive an email directly from GPM.
Nassau (formerly Phoenix)		* Requires E & O after first e-app is submitted
Mutual of Omaha / United of Omaha		
Transamerica		
AIG – American General American International Group		* Requires E & O to be contracted
Other:		
Other:		
Other:		
Other:		

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

_____ Yes, I have E&O Insurance

_____ No, I do not have E&O Insurance