

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 (review pre-appointment). START SELLING NOW !!**

Carrier Name	Date Completed	Writing #	Pre-Appointment	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:				

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

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

_____ Yes, I have E&O Insurance

_____ No, I do not have E&O Insurance