

Licensed Agent Checklist

TO GET CONTRACTED, FOLLOW THESE STEP-BY-STEP IN ORDER!

* Operations Manager Email: genevieve.purifoy@fflforefront.com

Join our slack group via invite link (our team communication tool)

- Let your operation manager know once you join

Get E&O Insurance

- You can purchase E&O: [HERE](#)

- Select Option B

Send the Operations Manager:

- Proof of E&O Insurance

- NPN

- State License #

- Voided Check

Check your email for Contracting Instructions

- You will receive 3 emails from your operations manager:

1. "Prosperity Contracting"
2. "Family First Life (FFL)- Onboarding for New Agent"
3. "Getting Started with Family First Life"

Get contracted with Prosperity

*Make sure gov. ID matches your state of resident license

- Refer to the "Prosperity Contracting" email in the previous step

- When prompted, we recommend choosing the 9-month issue option, \$3,000 max, and daily pay EFT

-You will have to complete the AML course in order to be approved by Prosperity

Complete Anti-Money Laundering (AML) Course

- Learn about AML: [HERE](#)

- This can be completed through LIMRA: [HERE](#)

- Complete American Amicable specific AML and upload to SuranceBay "Profile Docs": [HERE](#)

Set up Hierarchy Compensation Management System (HCMS) Account

- Your HCMS Account setup link can be found in the "Family First Life (FFL)- Onboarding for New Agent" email

Complete Your Contracting Requests in SuranceBay

*Only once you complete your HCMS account, you will be emailed your personalized link to SuranceBay - contracting request platform

- Make sure you watch the entire [SuranceBay Overview Video](#) and then get started.

- Create a New Profile with SuranceBay, and then Request Contracts for all of the following carriers:

- Americo
- Mutual of Omaha
- AIG

- Confirm they move to BGA status

- SuranceBay Statuses:

- **Producer:** Go back through and confirm your contract request
- **BGA:** Good Job, you have done it correctly and your contract has been sent to our home office

- **Carrier:** FFL home office has sent your contract to the carrier
 - **Discarded:** Locate the reason, and email the operations manager for help
- Check your contracting request in SuranceBay on a daily basis for any notes on your requests

Follow up with each carrier in 5 business days after your Contract Request changed to "Carrier" Status

- Verify they have all your contracting paperwork and that there are no outstanding requirements
- Carrier contact info can be found: [HERE](#)
- Keep an eye on your email box for important messages and contracting confirmation from the carriers
- Make sure to look in your SPAM and Promotional folders in your email

Send a screenshot to your operations manager when all of the following carriers are in BGA status in your SuranceBay account:

- Americo
- Mutual of Omaha
- AIG

Once you receive your Agent/Writing Numbers from each carrier, add them to your HCMS account -Americo, Mutual of Omaha, John Hancock, and AIG

- Log into your HCMS Account: [HERE](#)
- Watch the HCMS video explaining this process: [HERE](#)
- Go to "Requests" -->"Add Requests" --> Select "Add Carrier" --> "Missing Carrier / Writing Number" --> Select the carrier and type in your agent/writing number with that carrier --> Select the appropriate products --> "Send Request"

*You can add Prosperity to your HCMS account only at specific times. Keep an eye out in the Slack group for announcements when you will be able to add Prosperity to HCMS. (Usually only a 1-hour window)

Receive the "Welcome To The Team" email to join our New Agent Training email series and "Time to get Started with FFL!"

- Register for Family First Life Agent CRM System- where you will purchase and manage leads
- Start the [New Agent Bootcamp](#) while waiting for the carriers to approve you

Complete carrier requests in SuranceBay for Aetna and American Amicable once they show

- Your operations manager will request these to be opened by corporate, which usually takes about 5 business days to show up

Accept Aetna and American Amicable in your HCMS Account once they show

- Monitor your HCMS Account so you can accept the contracting requests for Aetna and American Amicable
- Log into your HCMS Account: [HERE](#)
- Click the profile icon in the top right of HCMS Account --> "View Profile" -->"Requests" --> Select "Carrier Approved"

Once you receive your Agent/ Writing Numbers from Aetna and American Amicable, add them to your HCMS account

- Go to "Requests" -->"Add Requests" --> Select "Add Carrier" --> "Missing Carrier / Writing Number" --> Select the carrier and type in your agent/writing number with that carrier --> Select the appropriate products --> "Send Request"

Prepare to Dial and Run Appointments

Print out these documents to set yourself up for success

- All Phone Scripts
- Phone Objections

- Dial Tracker
- In-Home Sales Process
- Financial Inventory & Credibility Sheet
- Print these out: [HERE](#)

These steps will be covered in the New Agent Boot Camp (which is in the next step)

Order Leads

- Learn about the different types of leads and where to access them
- Have a "Lead Strategy Call" with your manager or upline VP prior to your first lead purchase
- Order Leads once you have your Americo writing number

Phone Script Training

- Watch the Phone Script Training video
- Start dialing and booking appointments
- Use the FFL Dial Tracker to track your dials and production

In-Home Presentation

- Watch every video and study the In-Home Presentation
- Bookmark the Quote Tools: [HERE](#)
- Take detailed notes

Decide when to work - Plan out your dial days/run days

- This business is **80%** Phones, **15%** In-Home, **5%** Product Knowledge
- Faster you become self-sufficient, the faster you will be successful.

Once you receive your carrier appointment confirmation and agent numbers

- Register for each carrier you received a writing number from
- Order supplies directly from the carrier- you can do this by visiting their agent portals
- Become familiar with their E-App

FINAL TIPS

Stay active

- Active in the Facebook Group
- Active in Slack
- Active in Training Calls

Finish "Licensed Agent Checklist"

- Go to the Agent Hub