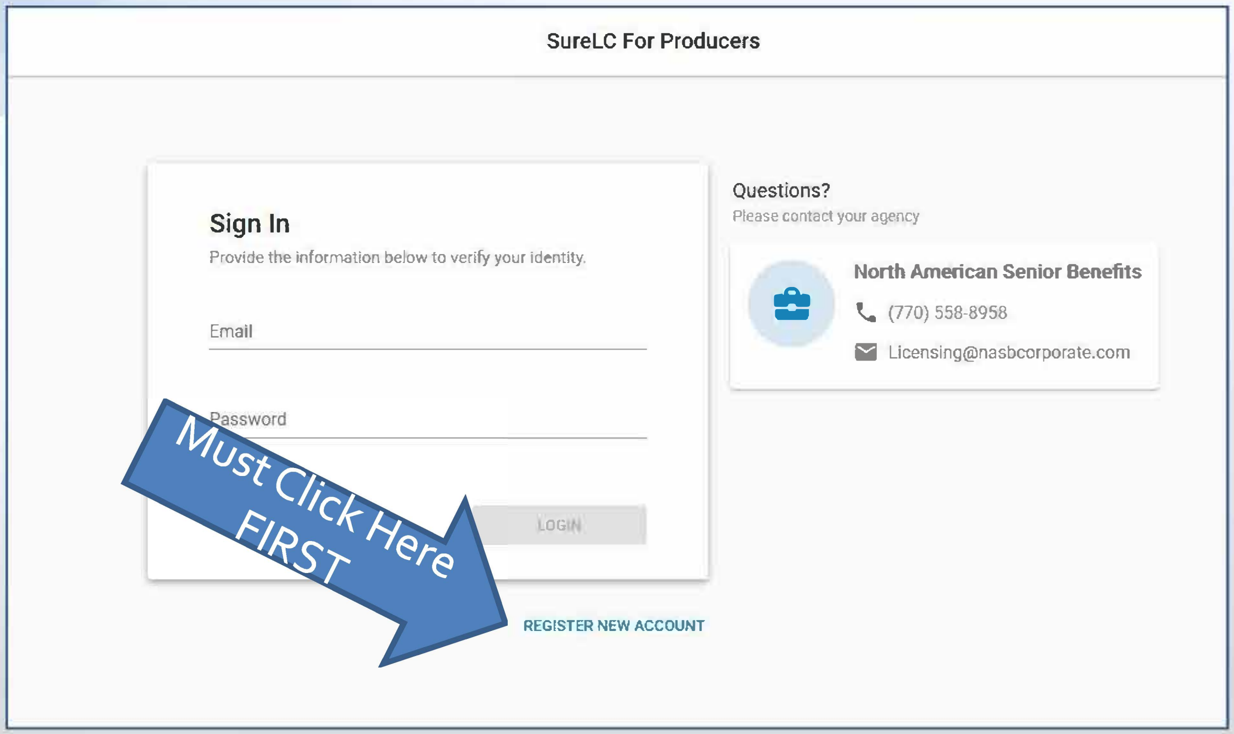
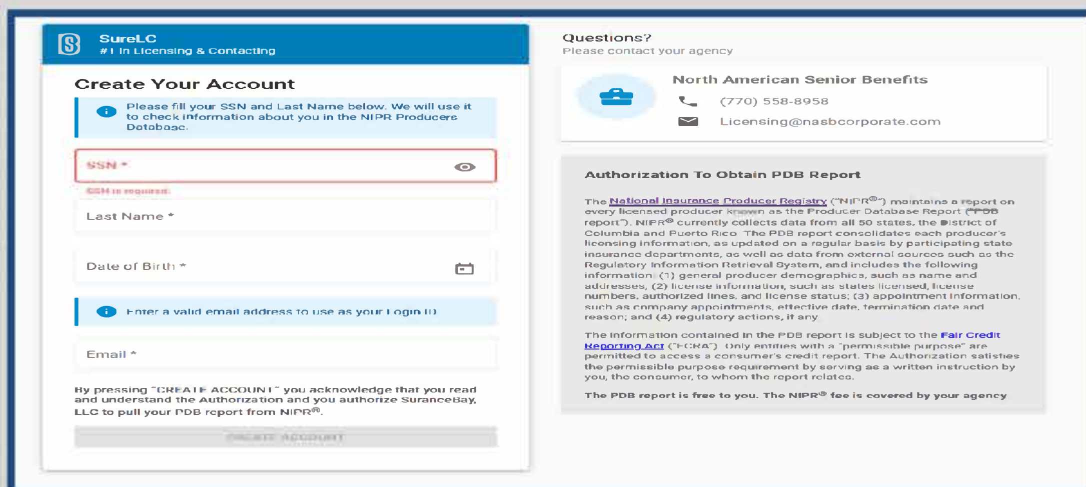
Agent Guide To SureLC

Step 1: Register and Create Your Account

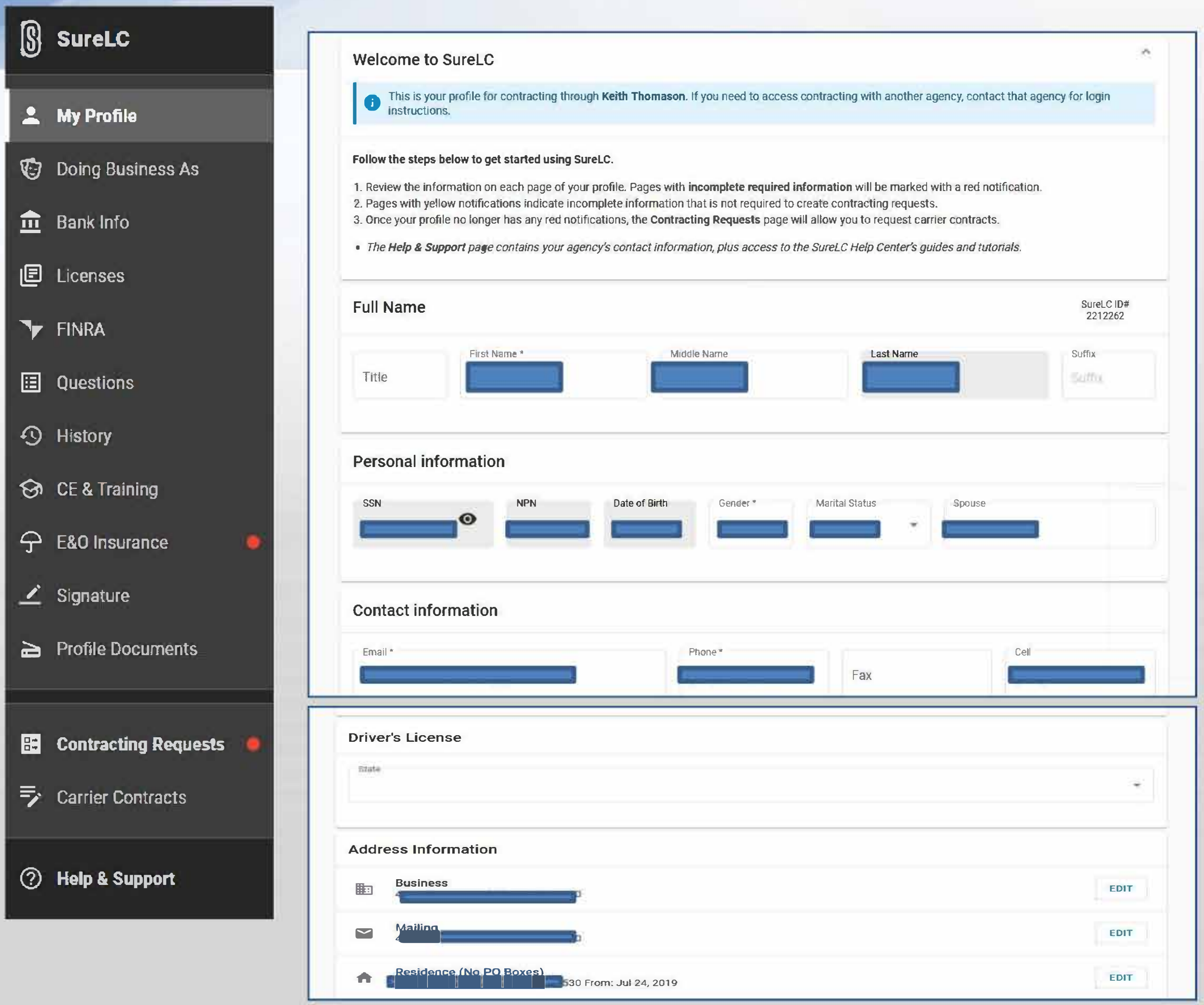
After You click the link you will land here



Fill out all required Fields



Step 2: Verify Profile



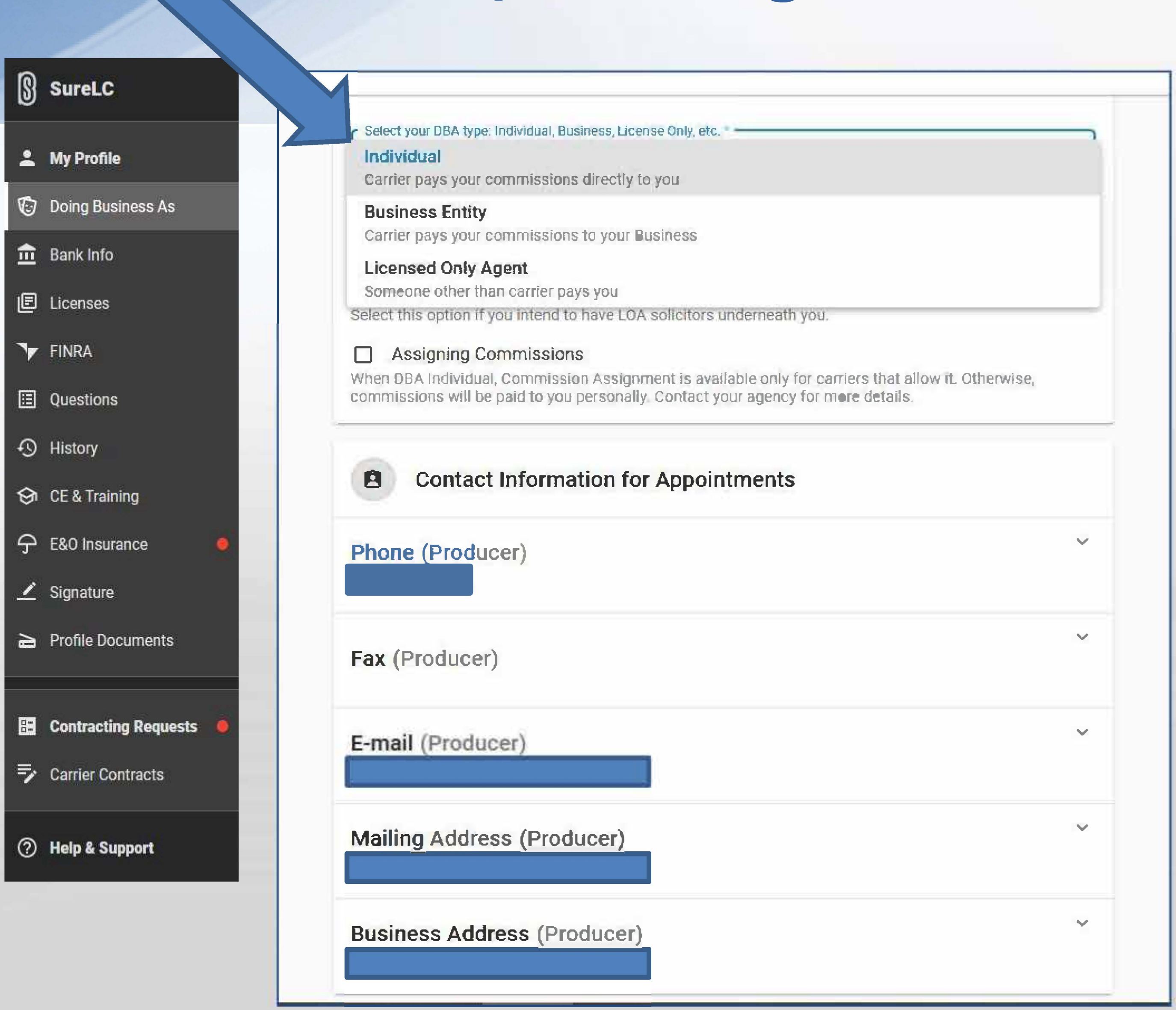
1- Verify that the information put in is correct.

2- Fill out any missing information.

Where you see blue boxes you will have your information filled in

**Warning do NOT change your address- contact your coordinator if this info is incorrect

Step 3: Doing Business As

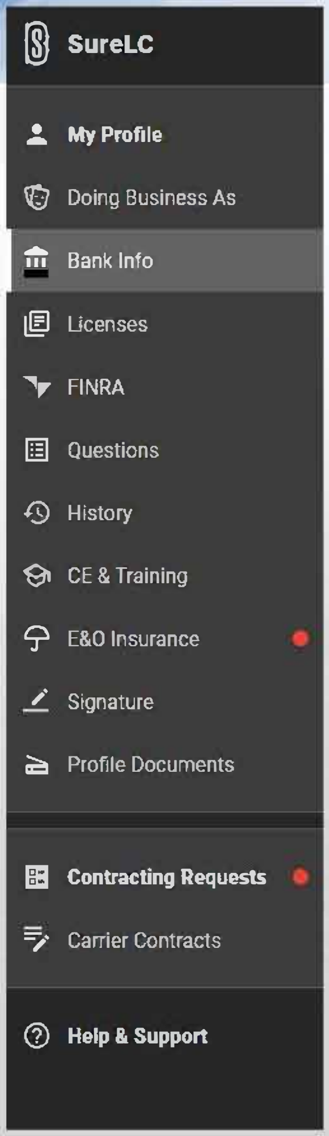


At the top of this page you will see a drop down arrow to Select how you are doing business: **You are doing business as an INDIVIDUAL ONLY-** even if you are paid through a company bank account, in order to do business as a company your company has to have an insurance license*.

**If your company has an insurance license please stop and contact your coordinator*

Step 4: Banking- There are 4 steps to this-

continue to page 2

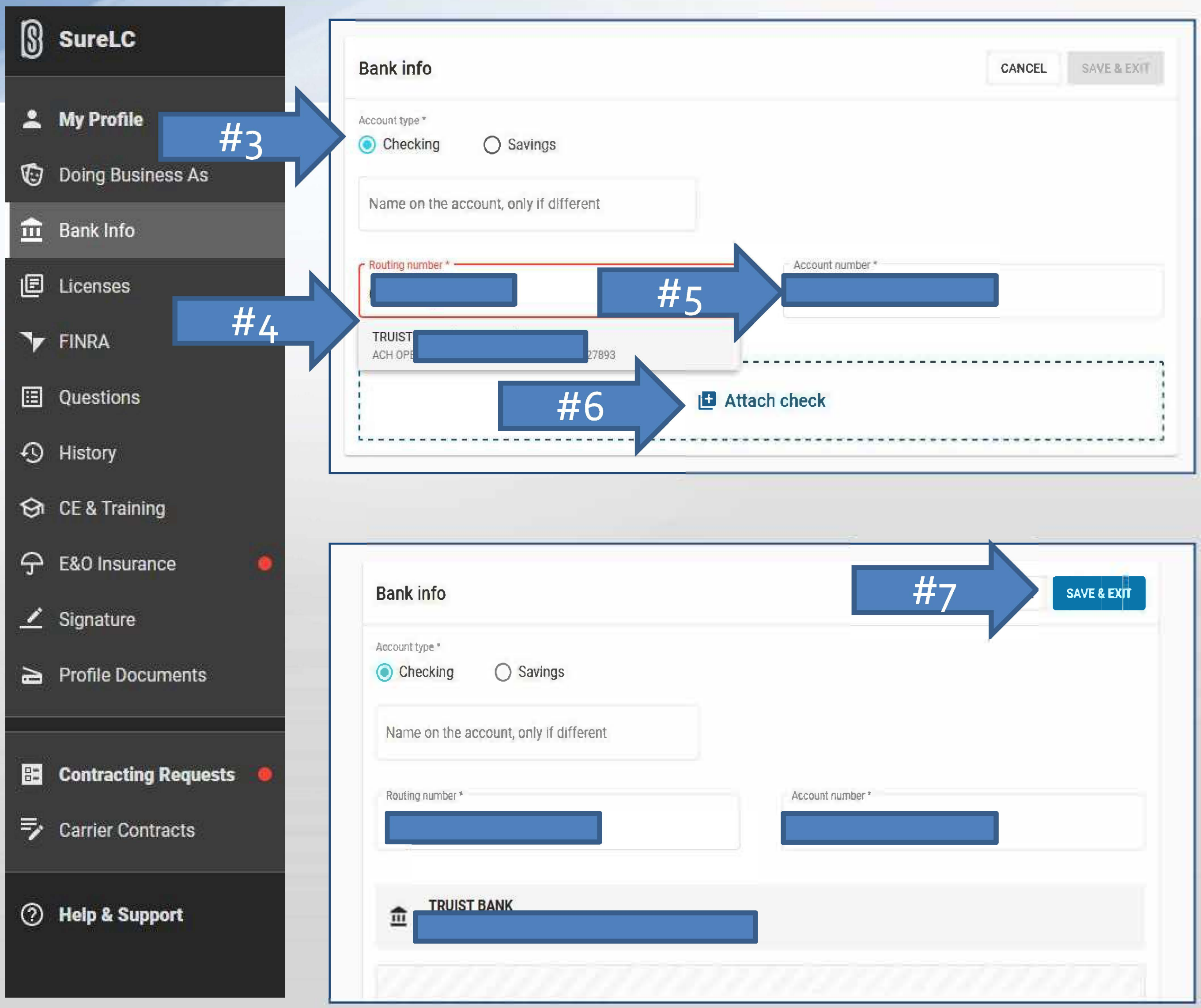


1-Click **Add Bank Info**

2- Click **Just Add Account Info**

Warning Do NOT click "The Drag and Drop" on this page Continue to Next Page..

Step 4: Banking- continued



3- Choose the Type of Account

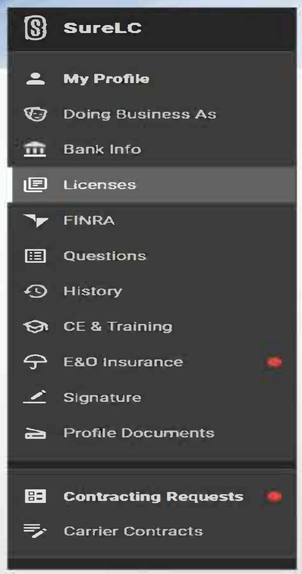
4- Type the Routing Number: Once your bank appears you MUST select from the drop down, otherwise the bank will not populate correctly.

5- Once you choose your bank from the drop down– **Add your account number**

6- Then use the attach check to upload the picture of your banking **Be sure to use the form uploaded in the OS**

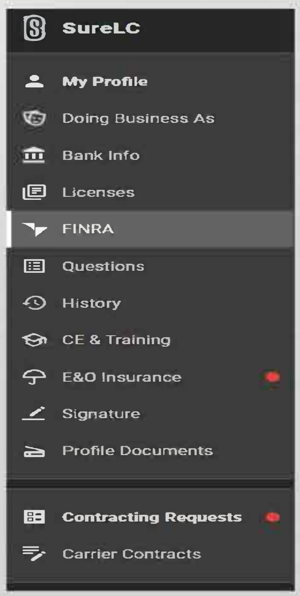
7-Once Populated, you MUST hit **Save and Next** or there will be an error

Step 5: Licenses & FINRA Tabs



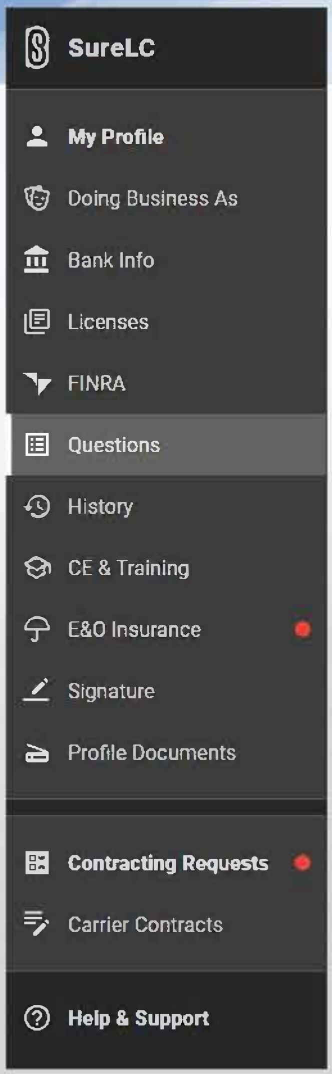
Leave License tab as is

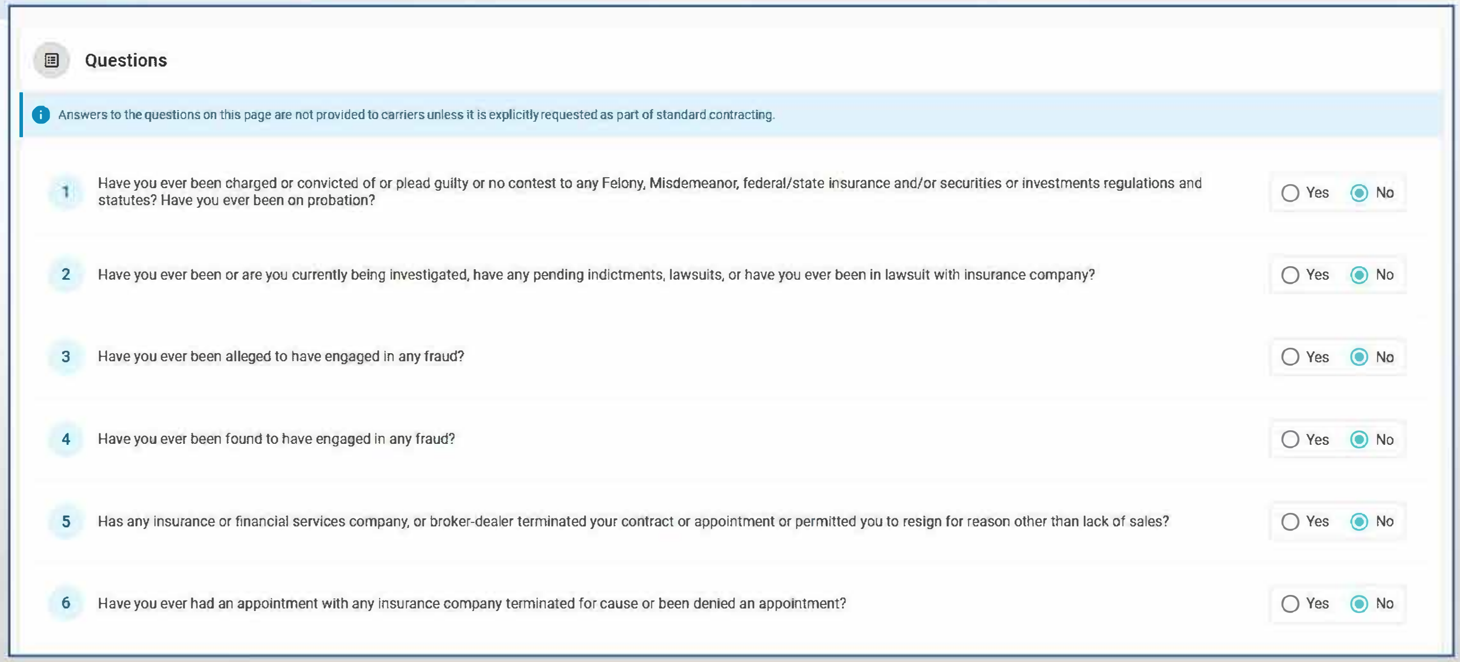
Skip right past this



On the Finra Section: **Select NO-** the only way you are a yes is if you have an ACTIVE Securities license

Step 5: Legal Questions and Letter's of Explanation





Answer ALL questions honestly. If you Select Yes it will open a spot for you to attach a letter of explanation. Use the letter you created in EOS and any court documents or police records you have – DO NOT fill out the form inside the SureLC system. **If any information is left off, the carriers will deny appointment.**

If you have any questions be sure to stop and call your coordinator- the next page in this book are other things to understand if you do have any yes answers.

Step 5: Letter's of Explanation-

If you answered No to all the questions you can skip this page

If you have yes answers:

It is Imperative that you account for each issue- this includes if you have multiple of the same type of infraction- For example, if you have two misdemeanors, one on 12.3.2009 and one on 3.16.2004, it is Two entries under each misdemeanor question.

Please NOTE: For question one-There are two misdemeanor, two felony, and two regulatory questions so pay close attention to what needs a yes. One relates to the charges, the other relates to the convictions.

Also: Charged and conviction dates are rarely the same- Please provide accurate dates- if you don't know, stop and get your court records- Yes, it's that important.

It is okay that the letter from the EOS, has all the explanations on one, you still must upload it to each individual date that you put in the system. (Same letter goes on charge, conviction, and any or all other items you put dates on).

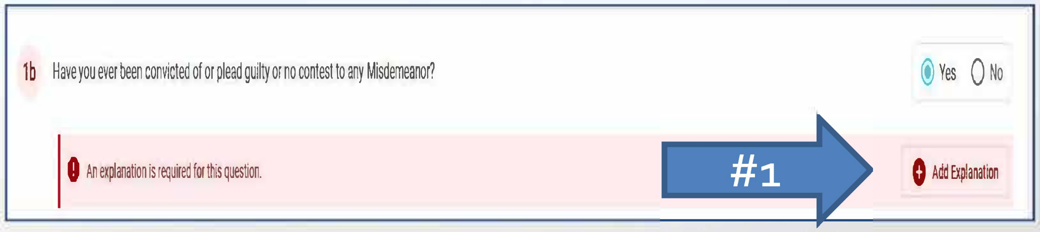
SO IMPORTANT: When you go to attach the letter of explanation **DO NOT** hit create, hit upload document.

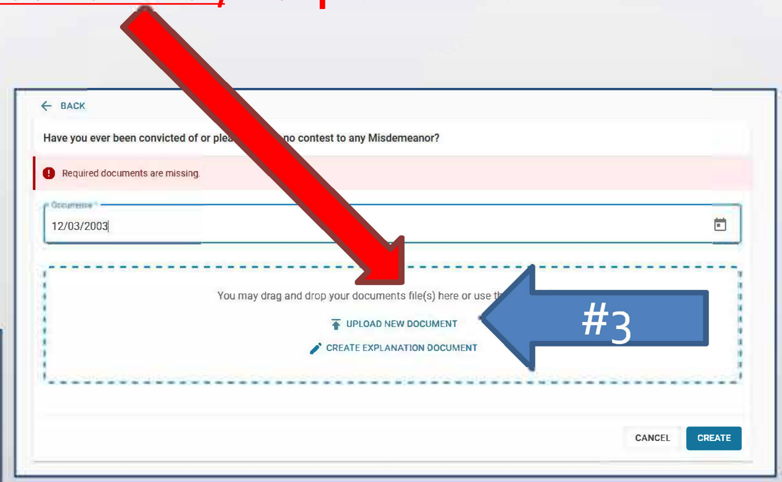
For Pictures on how to Upload please see next page.

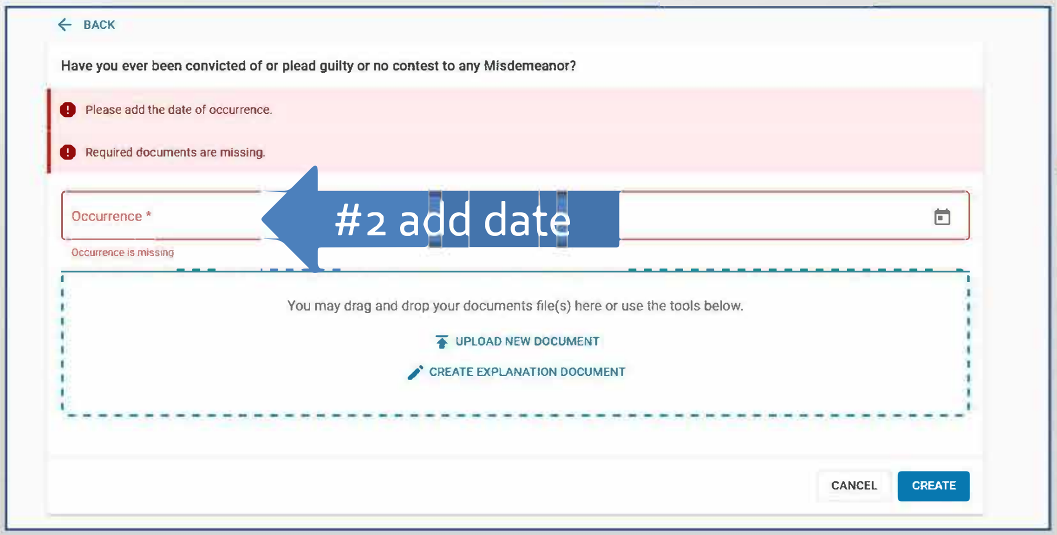
Step 5: Letter's of Explanation-

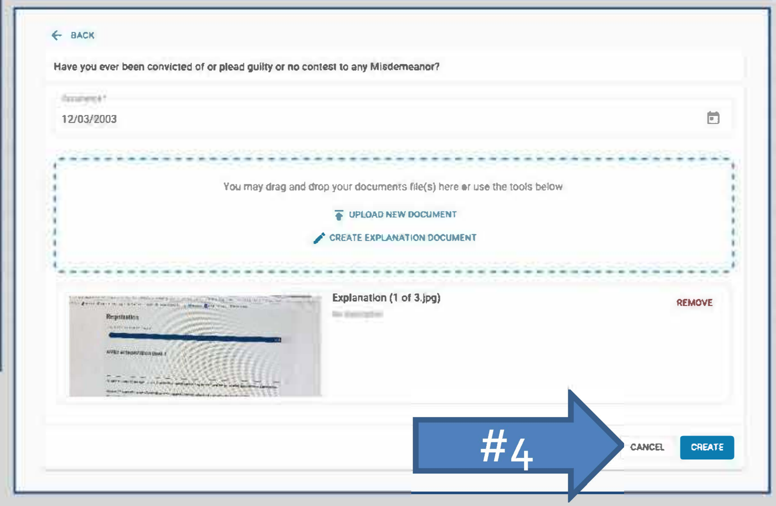
If you answered No to all the questions you can skip this page

SO IMPORTANT: When you go to attach it do not hit create, hit **upload document**
Repeat for each date added







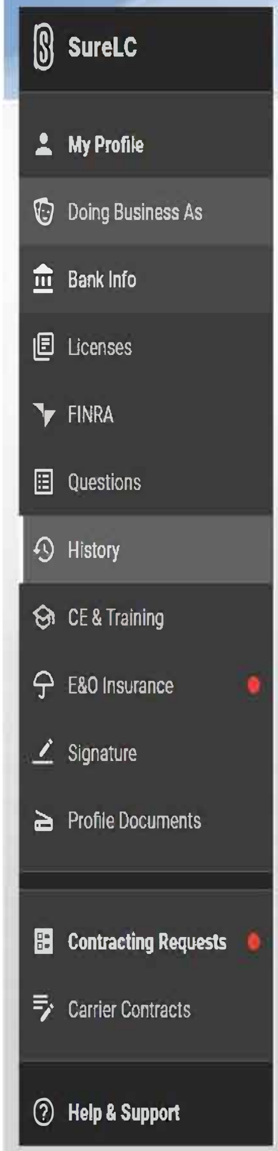


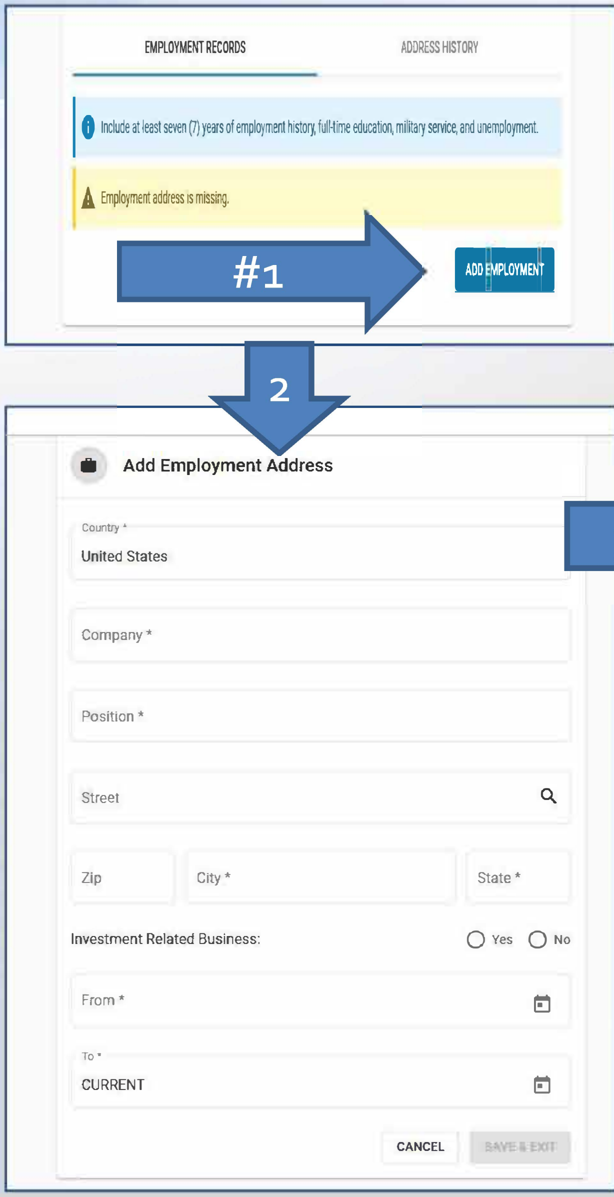
1- Add explanation
2- Put in date
3- Upload Document
4- Create

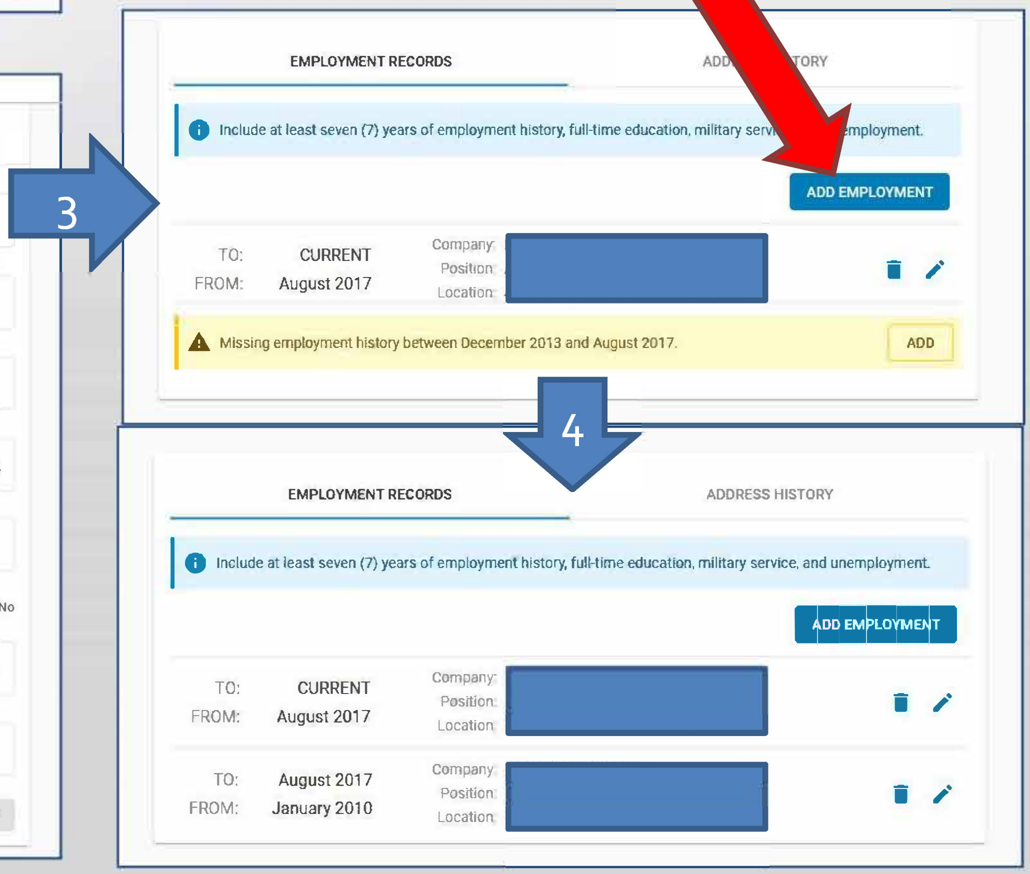
If you are confused or can't get the system to work please stop and contact your coordinator

Step 6: Employment History

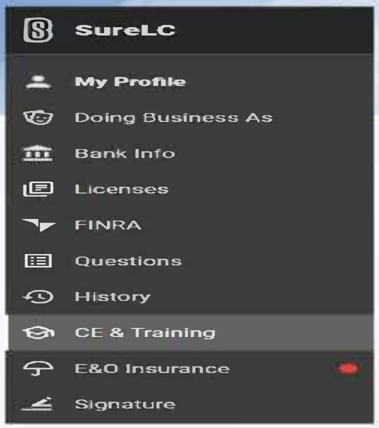
Employment must cover 7 years AND not have gaps-if there are gaps enter "unemployed" and add the dates. Keep adding jobs until you reach the seven years.



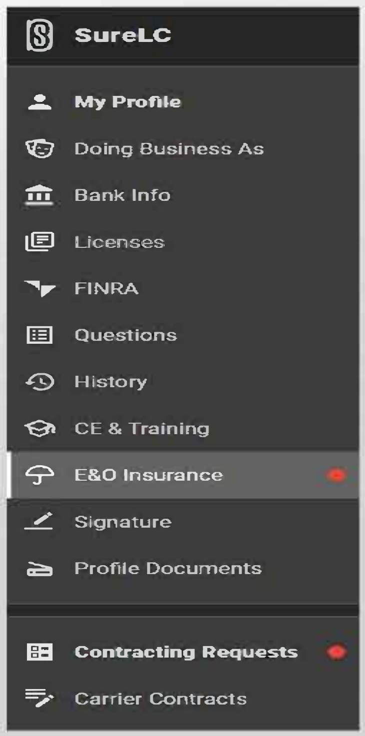


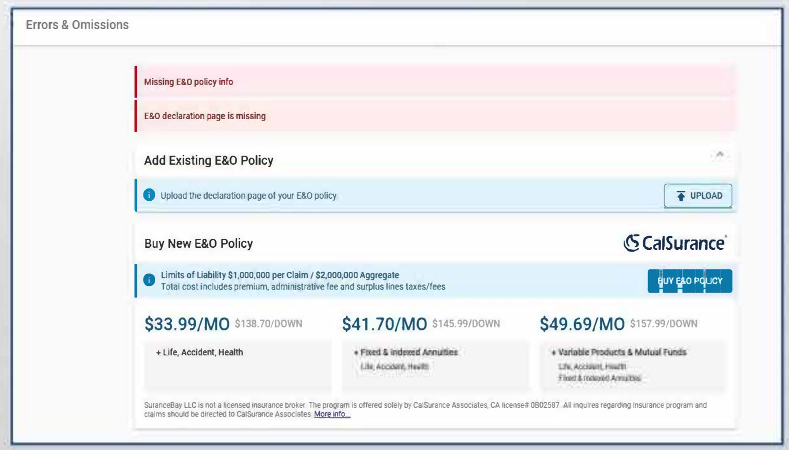


Step 7:CE and Training & EO Tab



Leave the Training page completely as is, the coordinators will populate what is needed.





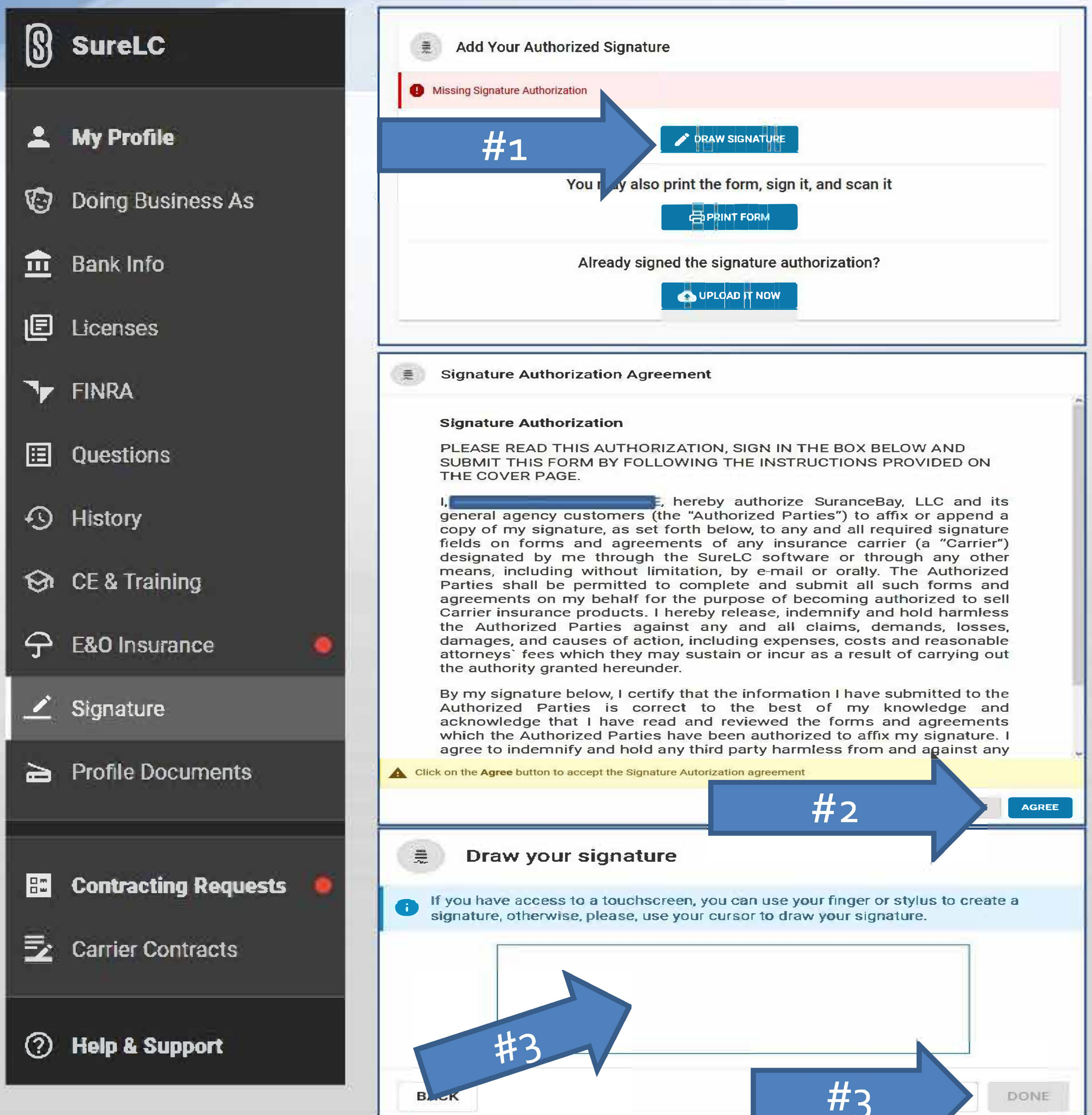
The E&O Tab is an advertisement: You are **NOT required**, to purchase this . You may skip it. (The red dot can stay) If you want E&O, there is the one offered inside of the system (However, this one does NOT auto renew*)

If you have E&O Click Upload and enter information and attach certificate

*Please see the following link for E&O insurance that auto-renews:
https://www.napa-benefits.org/insurance/errors-and-omissions-eando-insurance

E&O insurance is insurance you carry on yourself as a broker, for if someone ever took you to court over insurance related issues. It opens three more carriers and more products up to you that you do NOT have access to without carrying E&O insurance. However, it is NOT mandatory and can be picked up and applied at any time

Step 8: Signature Authorization Page



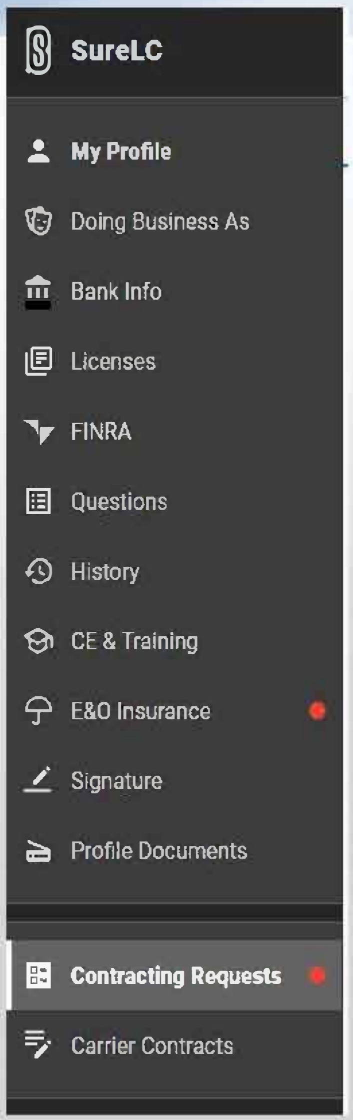
1- Click Draw Signature

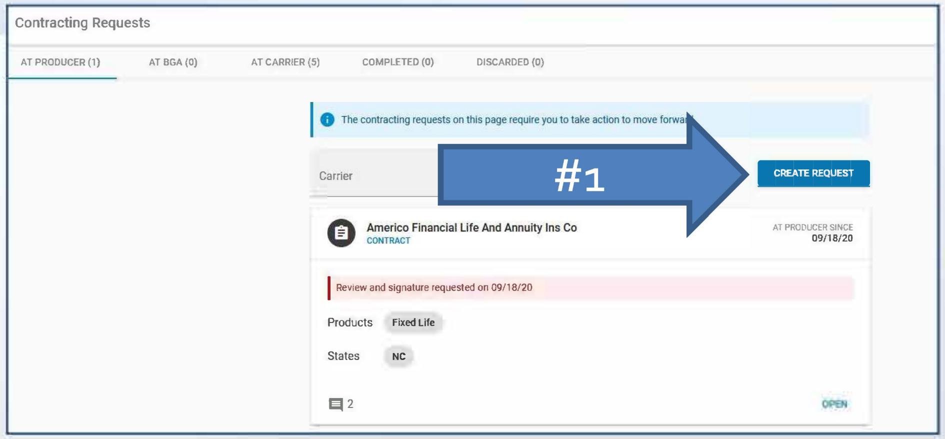
2- Click Agree

3-You must *hold down your mouse button to draw your signature* and then click done

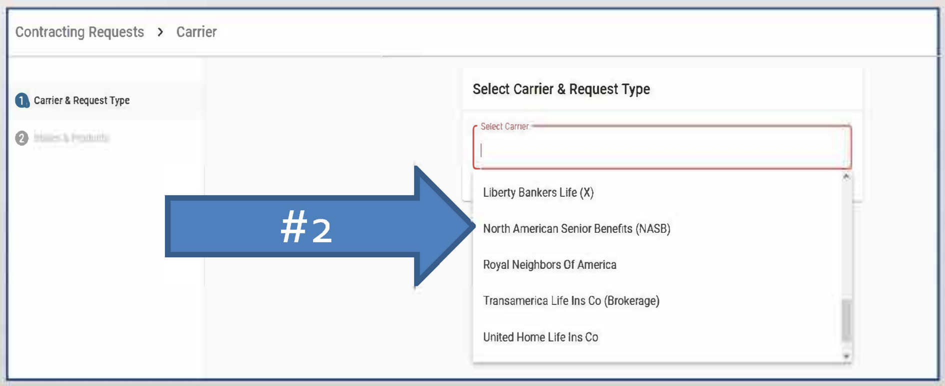
Step 9: Contracting Request

this step is 3 pages Long

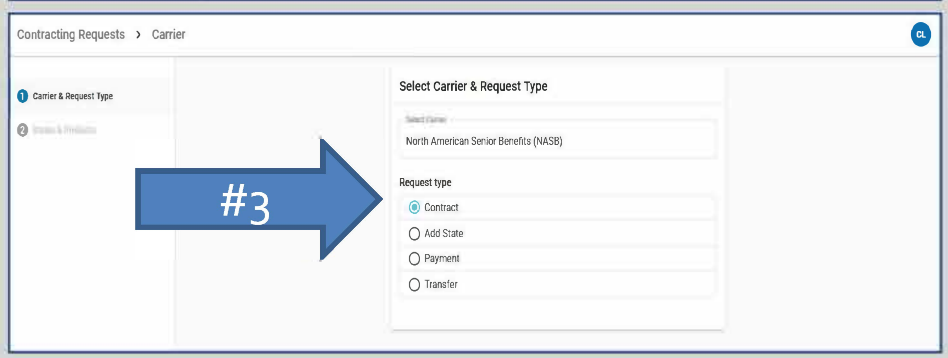




1- Click **Create Request**

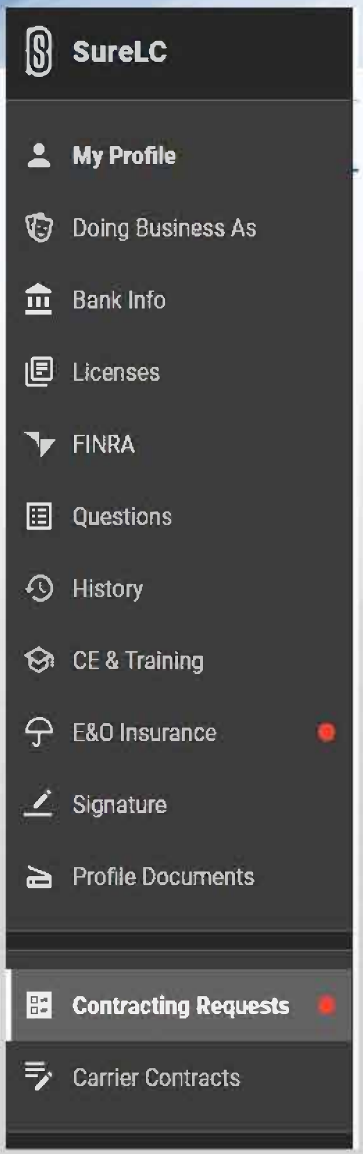


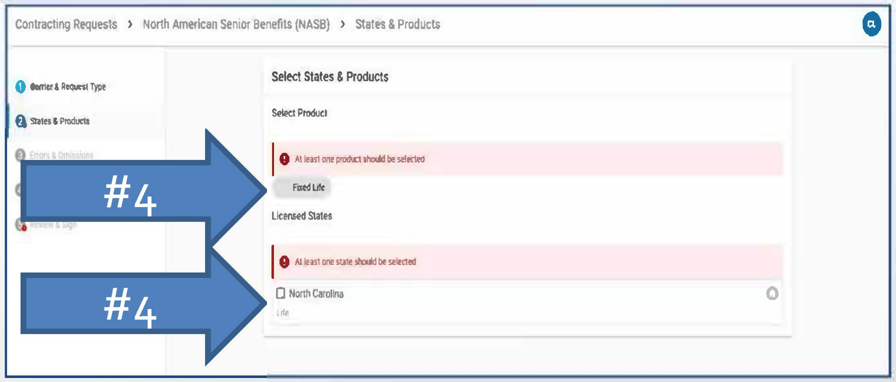
2- On this Drop Down: ONLY Select North American Senior Benefits: If you select more carriers it will tie up your contracting.



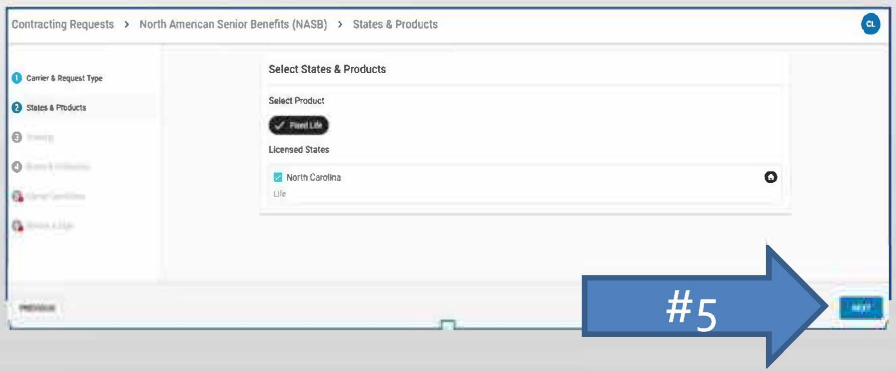
3- Choose Contract Only

Step 9: Contracting Request continued

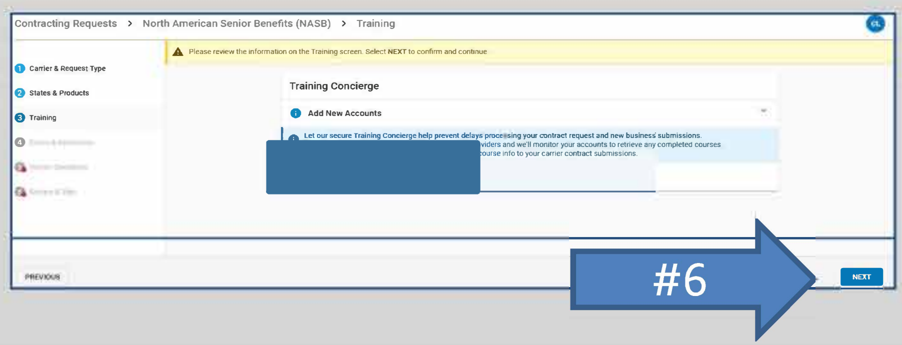




4- Click BOTH
•Fixed Life and
•Your State- You may select any states you have options for but MUST click your resident state

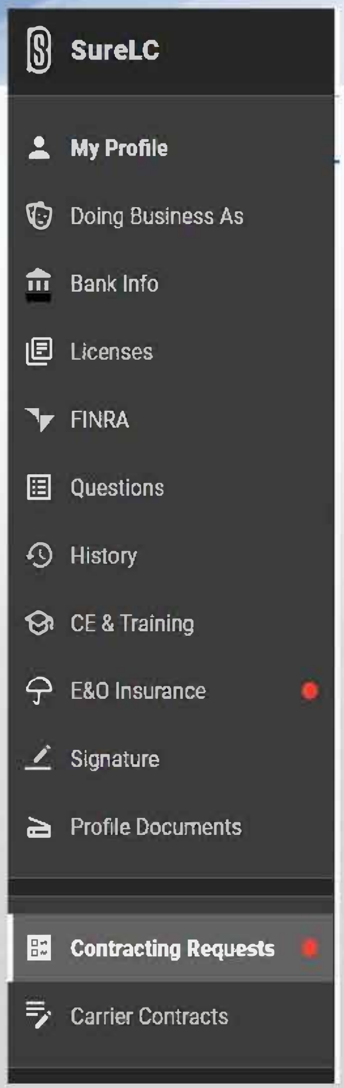


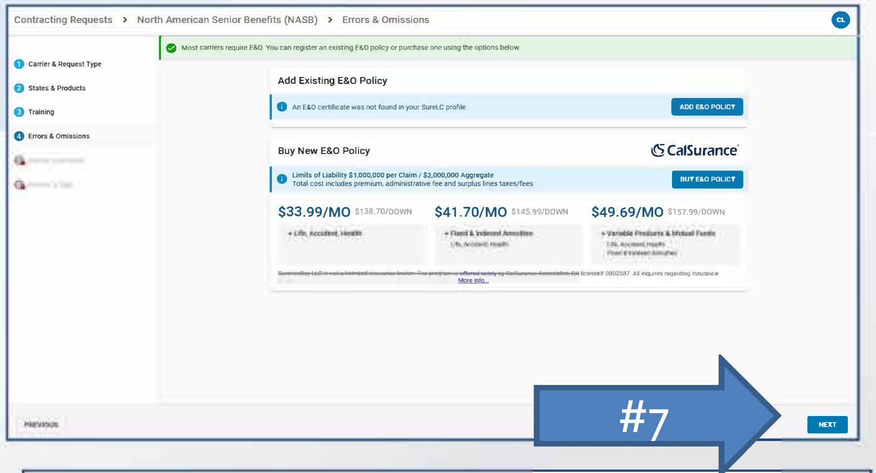
5- **Click Next**



6- **Click next.** We will take care of this during another step

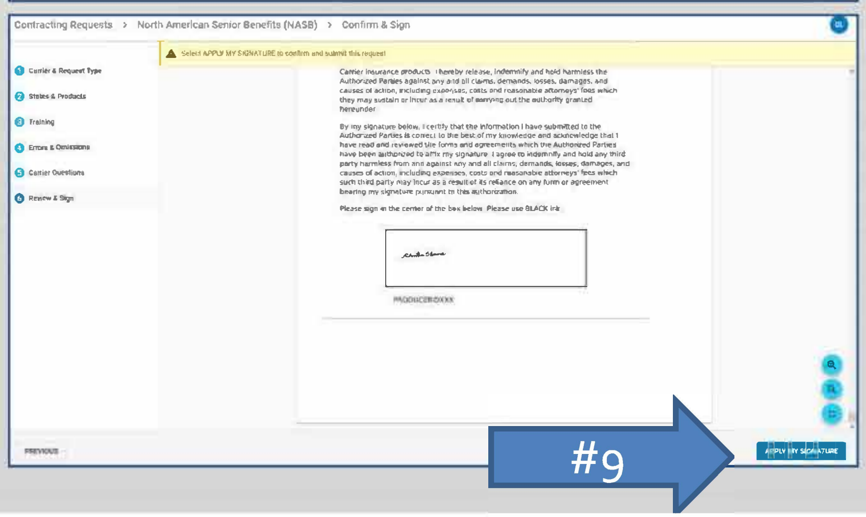
Step 9: Contracting Request continued





7- This is another advertisement for E&O, you can skip by clicking Next

8- Here is your NASB contract- you will need to **scroll** ALL the way to the bottom of this before the Apply signature will highlight



9- Apply signature- it will give you the option to download the contract- That's it! We will be back in touch with what's next. Welcome to *NASB*