

## CARRIER CONTRACTING CHECKLIST

After your Carrier Contracting Packet has been submitted and approved, you will receive emails from SureLC/Surancebay for each insurance carrier listed below. 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 column "Date agent completed contracting emails"**

**After you have completed the Contracting emails, TEXT a photo of this document to your manager.**

Carrier Name	Date agent completed contracting email	Have you been previously contracted with this carrier?	Carriers that will assign you a writing number before submitting business  (Write in your agent # when received via email by the carrier next to YES 's below	Online Carrier Account Setup Date agent completed online account on Carrier's website. Make sure you save your login credentials for each carrier's website. <b>** CHECK YOUR SPAM FOLDER **</b>
Accendo / CVS			Yes	
American Amicable (AmAm)			Yes	
<b>Note: AmAM</b> does not use SureLC. You will receive an email from <a href="mailto:onboardingspecialist@theodoreagency.com">onboardingspecialist@theodoreagency.com</a> with a link				
Americo			Yes	
Foresters Financial			Yes	
Mutual Of Omaha (MOO) / United of Omaha			Yes	
Transamerica			No - Business first. Must submit an application BEFORE # is assigned	
Ethos			You will not receive a writing number from Ethos. Your email and cell phone number will be used to login to their site	
AIG / Corebridge			No - Manager must request contracting to be processed once you have business to submit	
Other:				
Other:				

<b>GPM - Government Personnel Mutual</b>	<b>GPM utilizes their own contracting system. The first email you will receive is Email 1 listed below. After completing Email 1, you will receive Email 2 and Email 3 as listed below. <b>** CHECK YOUR SPAM FOLDER **</b></b>		
	<b>GPM Writing Number:</b> _____		
Email 1	<a href="mailto:agentonboardingnoreply@gpmlife.com">agentonboardingnoreply@gpmlife.com</a>	Date Received and Completed:	
Email 2	DocuSign	Date Received and Completed:	
Email 3	Accurate	Date Received and Completed:	

Agent Name: \_\_\_\_\_ Date: \_\_\_\_\_ Equis Agent #: EF \_\_\_\_\_

Resident State: \_\_\_\_\_ Non-Resident States: \_\_\_\_\_

\_\_\_\_\_ Yes, I have E&O Insurance \_\_\_\_\_ I DO NOT have E&O Insurance