

CARRIER CONTRACTING CHECK LIST

Print this document and follow instructions below:

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....refer to Notes below.

As you complete each request, write in the date completed in the table below in the column “**Date SureLC Emails Completed**”

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

**** After you complete the SureLC emails you must monitor your email inbox and spam folder for Welcome Emails from carriers****

Carrier Name	Date SureLC Emails Completed by Agent	Have you been previously contracted with this Carrier?	Writing # will be issued for new agents Write the #'s below for each YES Carrier	Pre-Appointment	Notes / Comments
Americo			Yes		Requires E & O to be contracted
Foresters Financial			Yes		
GPM – Government Personnel Mutual	(See Notes) Date you completed GPM Contracting:		Yes		GPM does not use Surancebay. You will receive an email directly from GPM’s contracting system. ** CHECK YOUR SPAM **
Great Western / Wellabe			Yes		
Mutual of Omaha / United of Omaha			Yes		
AIG – American General American International Group			No		Requires E & O to be contracted Pre-Appointment Request by Mgr
Columbian Financial Group (CFG)			No		
Transamerica			No		
Royal Neighbors			No		
Other:					
Other:					
Other:					

* Please indicate above if you have been previously CONTRACTED with any of our carriers.

**Review Pre-Appointment with your manager

***Writing Numbers: You will receive writing numbers from the carriers with a “YES” before submitting your first application.

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

Did you have your Life Insurance License prior to joining Equis: YES or NO

Resident State: _____

_____ Yes, I have E&O Insurance

_____ No, I do not have E&O Insurance