Senior Life Insurance Company

Instruction Guide Sheet (for agents new to the company)

For Contracting and Success with

Senior Life

(Print this PDF Guide Sheet)

I

1. Welcome to Senior Life Insurance, the company who cares about and puts the client first and provides lifetime renewals and opportunities for growth for its agents. Your sponsoring agent is available to assist you in each of these instruction guide steps.
2. Once you make the decision to join Senior Life Insurance Company, the first step is to log in to the Financial Heritage Agency website at the following link: http://financialheritagegroup.wordpress.com Register for the Blog via email (lower right column).
3. Click the "Contracting" Button in the Black tool bar. Ensure you complete the following paperwork package:

A. **Agent Data Sheet** for background check and Credit Card Authorization

B. **New Agent Appointment Fee Form**, with W-9, and Credit Card Authorization

C. **New Agent Agreement 2013**- The "agent appointment contract".

D. Copy and Scan your state insurance license to include in the email scan with the package of documents.

E. Letter of explanation (if required) for explanation of credit scores, bankruptcy etc.

F. Your voided check, so that your commissions can be direct deposited.

G. You must request your commission schedule from your sponsoring agent (This schedule is not on the website and must be obtained directly from your sponsoring agent.)The commission schedule must be wet-ink; hand written signature, scanned and emailed with the aforementioned documents in A-G.

4. You may FAX items A through G or you may scan and email items A-G; we recommend you scan and email all documents. Whether you scan or fax, please ensure all documents are bundled in a package. Sending an incomplete paperwork package runs the risk of lost items.

Email the document package to: Kim Hausmann at khausmann@srlife.net Or FAX: 229-228-7074.

After your paperwork is submitted, please call Kim Hausmann at Senior Life Corporate 877-777-8808, within 24 hours of submission of paperwork to ensure all paperwork has been received. Ask for a prospective date assignment for the **agent writing number**. Your **agent writing number** is required for writing business, and must be listed on all sales applications.

II

Your Agent Writing Number is emailed to your sponsoring agent. The sponsoring agent will then email or text your Senior Life Writing Number to your email address or cell phone. It is imperative to ensure your sponsoring agent has both your correct email address and cell phone number.

Congratulations! You have received your **Agent Writing Number**. You should receive your agent supply kit within 5 business days which includes: business cards, brochures and applications. The kit will be shipped to your physical address.

1. Go to the Senior Life Corporate Website Link: http://www.seniorlifeinsurancecompany.com Scroll to the bottom of the Home Page. Click the gold button "Agent Center".
2. Go to **"Agent Resources"**; Click button; Member Log In; click "Register".
3. Enter Registration Information in the online form. Your USERNAME is: your agent writing number (type your writing number in the blank); Your PASSWORD is created by you on this form.
4. Click **REGISTER**
5. You will want to review/study the agent resources site. You will find your state applications under the "**Application Download Center**", as well as a multitude of informational resources.
6. IMPORTANT NOTICE: Once you register in the **"Agent Resources"** link, you will receive an email confirmation. You MUST click the link in the email or you will not be able to enter the "Agent Portal". You MUST verify /accept the link in your email from Agent Resources prior to entering the "Agent Portal".
7. Click **"Agent Portal".** Enter your agent writing number in the USER blank; enter the last four digits of your social security number as your PASSWORD.
8. Then change your password to your "Agent Resources password".
9. The Agent Portal provides access to: Leads, Agent Production, Pending Policies, and Commission Statements, etc.

III

1. Visit the Legacy Assurance Website at: www.legacy-assurance.com

2. On Home Page, go to "**Advocate Login Tab**": Create an Account (left margin); "Click Create an Account". Use your writing number as **USERNAME, CREATE PASSWORD** and also register your first and last name.
3. Click the brown **"Register"** button at the bottom of the page.
4. You will receive a confirmation email; verify by clicking the link in the email. Check your junk or spam mail, if you do not receive this email.
5. Once registration is confirmed (most times in 24 hours), enter the website. For further instructions see the PDF for Legacy Assurance Instructions on the Financial Heritage website. Link http://financialheritagegroup.wordpress.com
6. ***Order supplies*** from Legacy Assurance at www.legacy-assurance.com by clicking the **"Marketing Materials Tab".** In the beginning you will need a minimum of 50 Legacy Assurance Product Guides and one Field Presentation. The order form for these documents is found under "Brochures"; "Brochures Order Form". The Field Presentation is **THE PRESENTATION BOOK** (16 pages) YOU WILL USE WHEN YOU MEET WITH YOUR CLIENTS. PRINT and Place the FIELD PRESENTATION and insert in a notebook or in a PPT and personalize it to your presentation style.
7. The Legacy Assurance website is where you will register your clients at the **"Membership Enrollment"** link.
8. You will need to email your **Sponsoring Manager** a list of the area **ZIP CODES** you will be working to order a lead mail drop for you. (It usually takes 2-3 weeks to start receiving leads after order is confirmed and placed.) Also ask you manager about what T**V LEADS** may be available in your area.

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