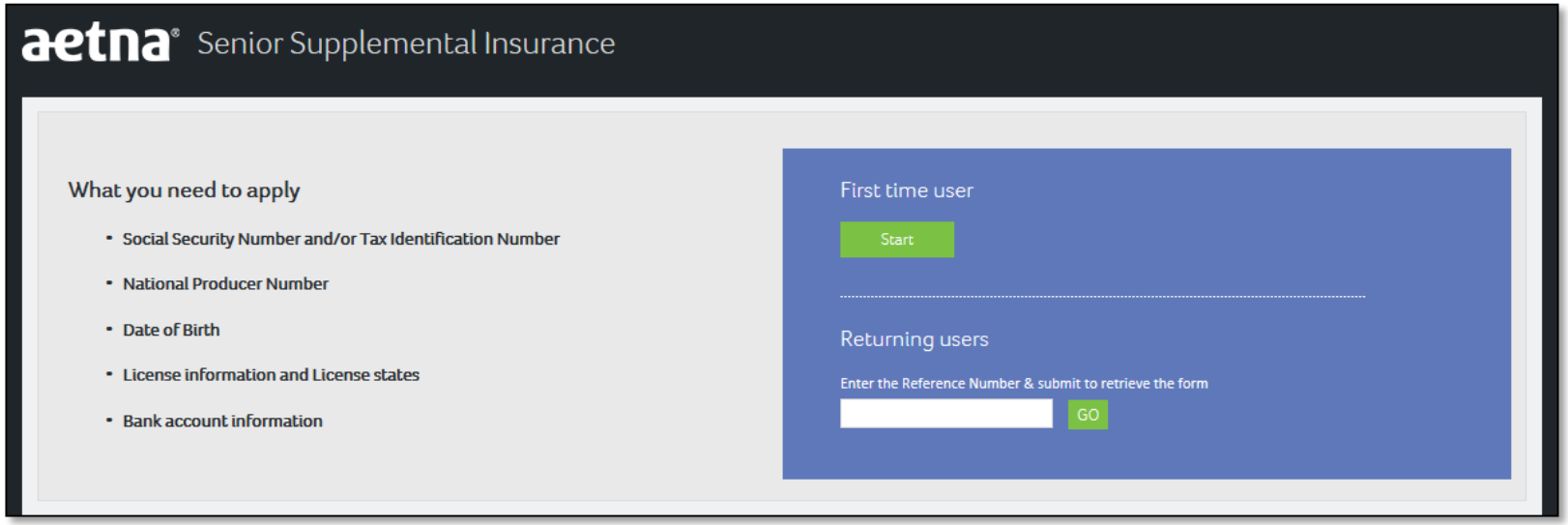
Agent's responsibilities

1. For first time users, click Start.
2. Returning users can enter their reference number and click Go.



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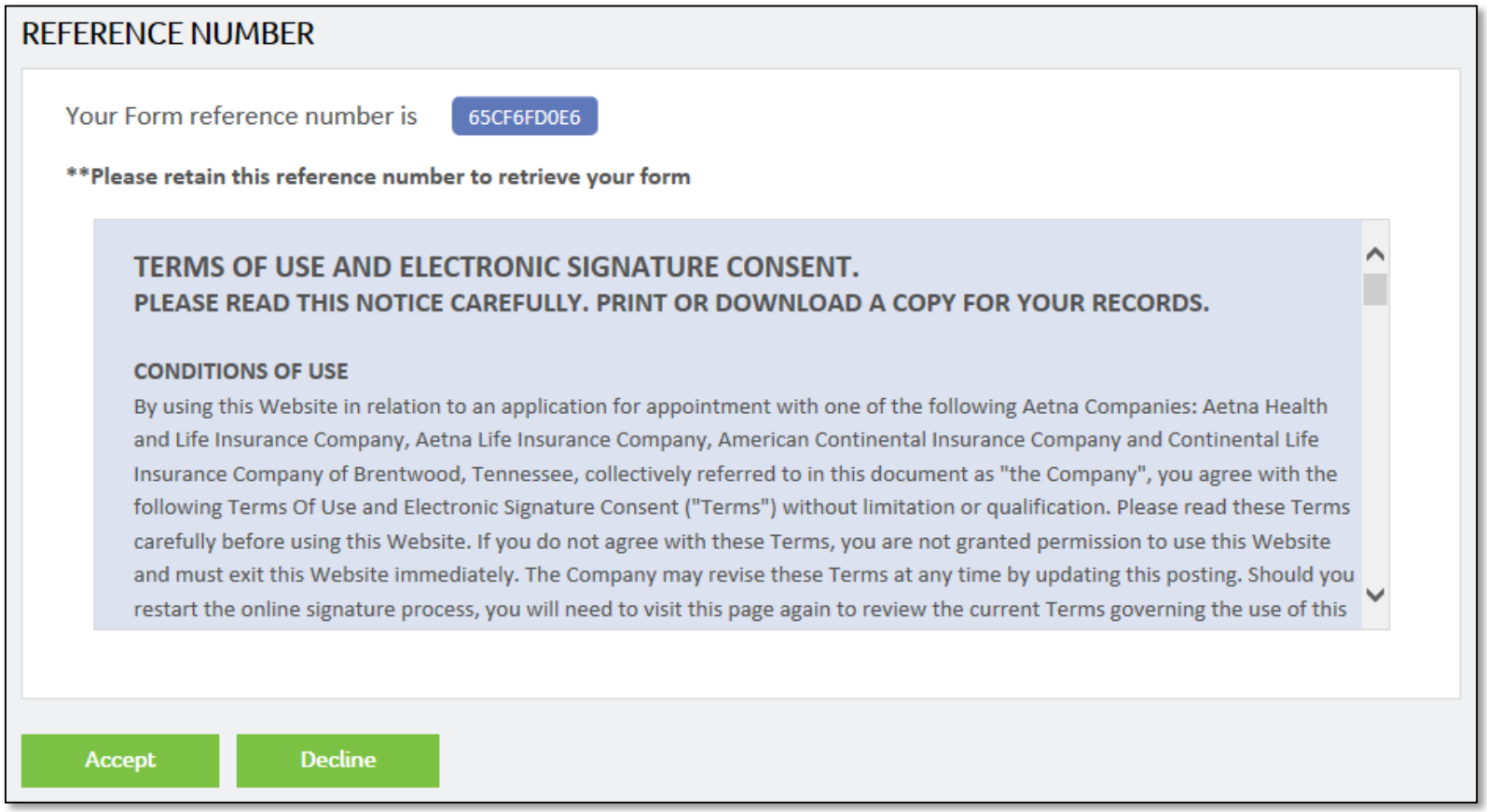
Agent's responsibilities

1. The agent should write down the reference number because he will need it to get back in.
2. Agent should accept the terms to begin the process



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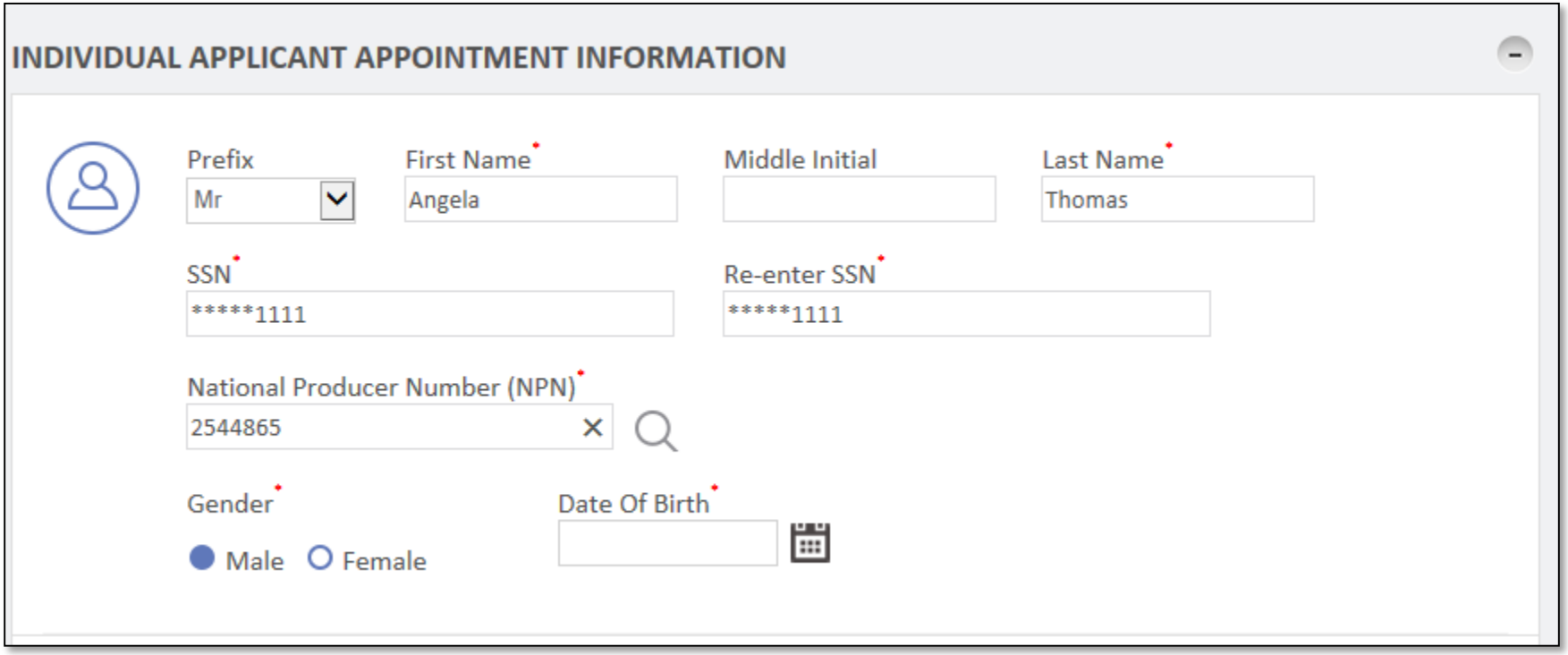
Agent's responsibilities

1. The agent should fill out all of the information on the page
2. Click continue



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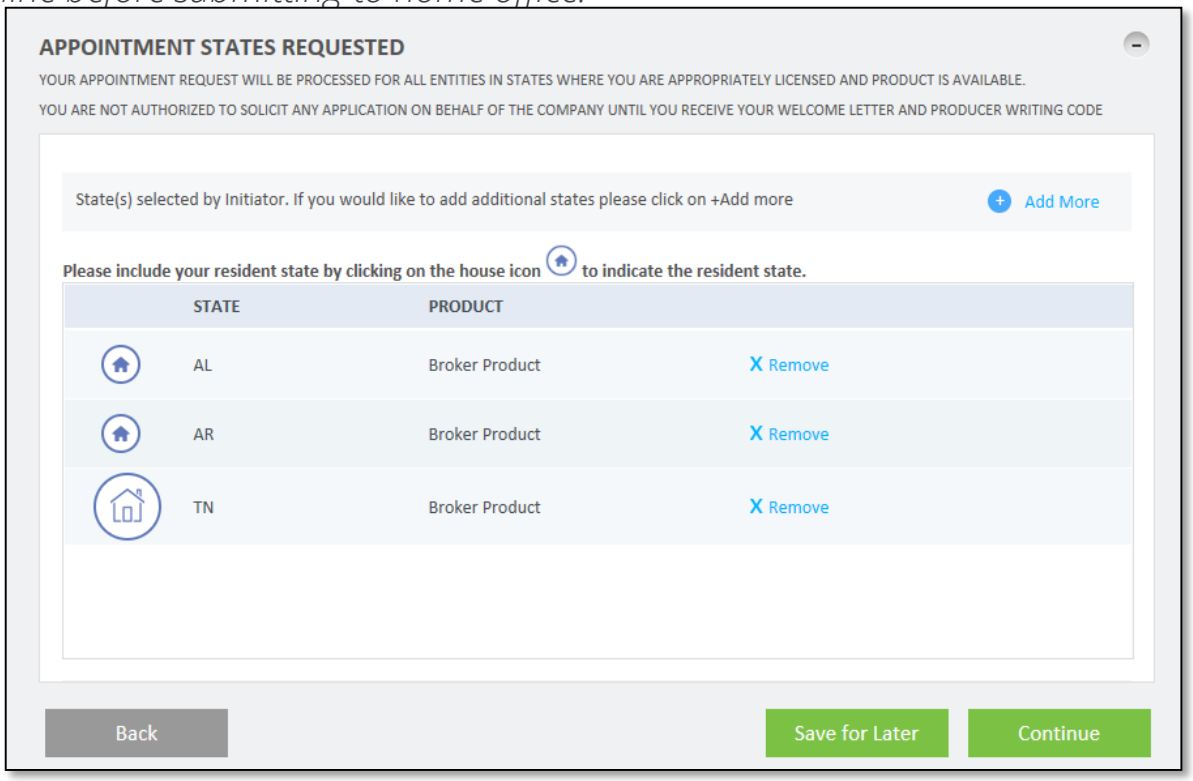
Agent's responsibilities

1. The agent should select his resident state
2. Click Continue

Note: If the agent wants to add additional states, he can click Add More. Any additional states would need to be reviewed by upline before submitting to home office.



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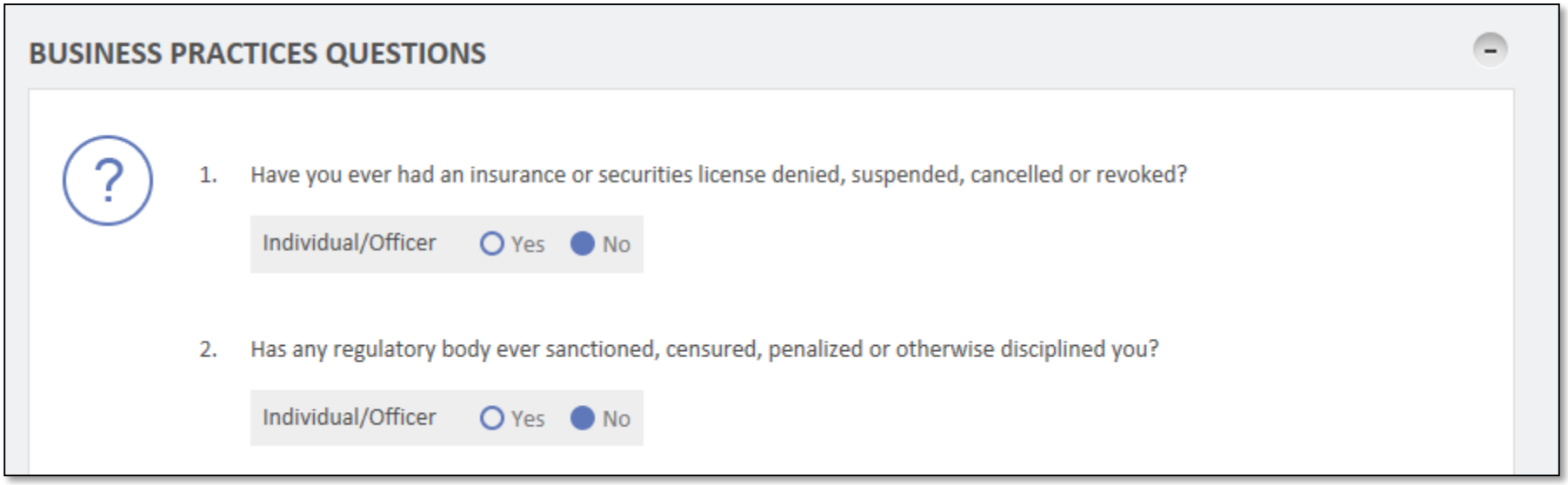
Agent's responsibilities

1. The agent needs to answer all business practices questions. A "yes" answer will prompt and explanation at the bottom of the section.



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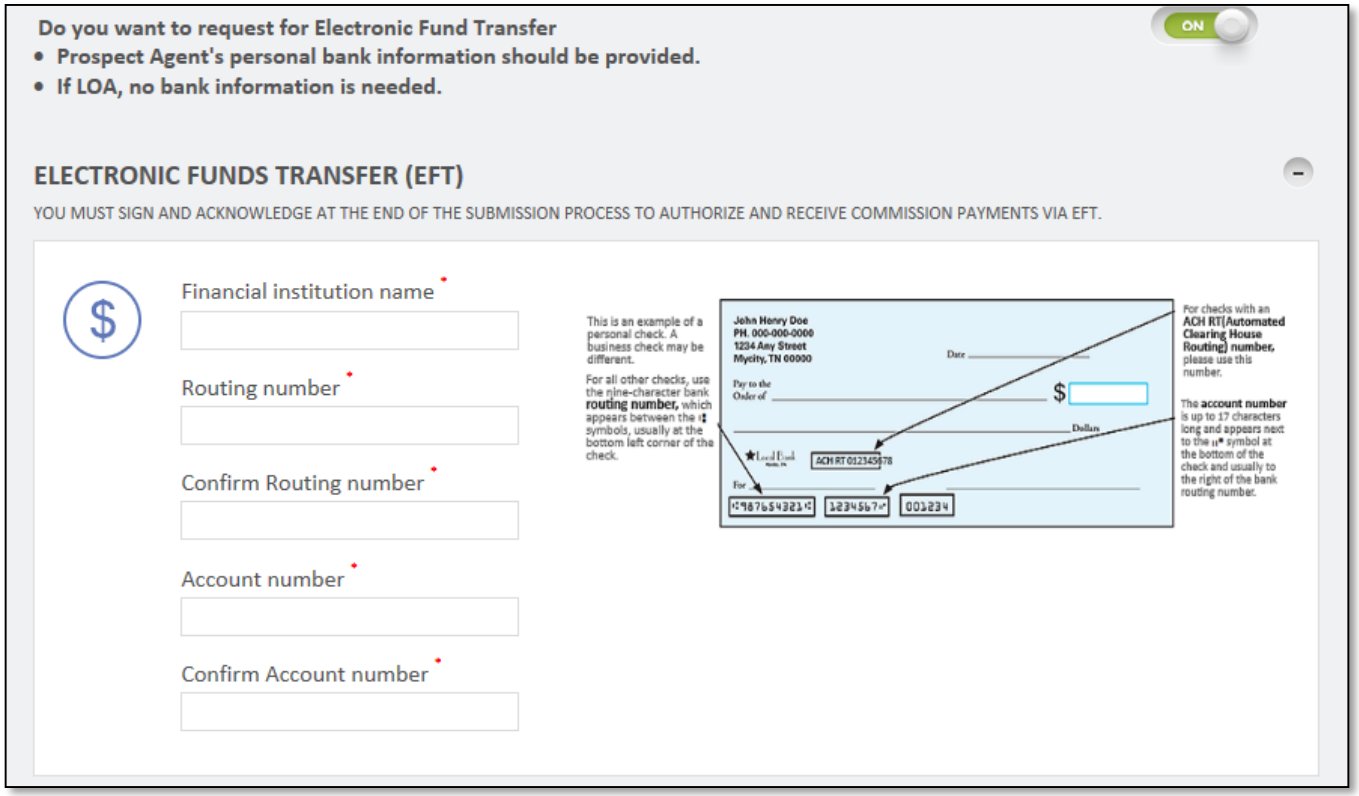
Agent's responsibilities

1. The agent can enter banking information to receive commissions by EFT.
2. The agent can change the slider to Off to receive commissions by check.
3. LOAs do not need banking information.



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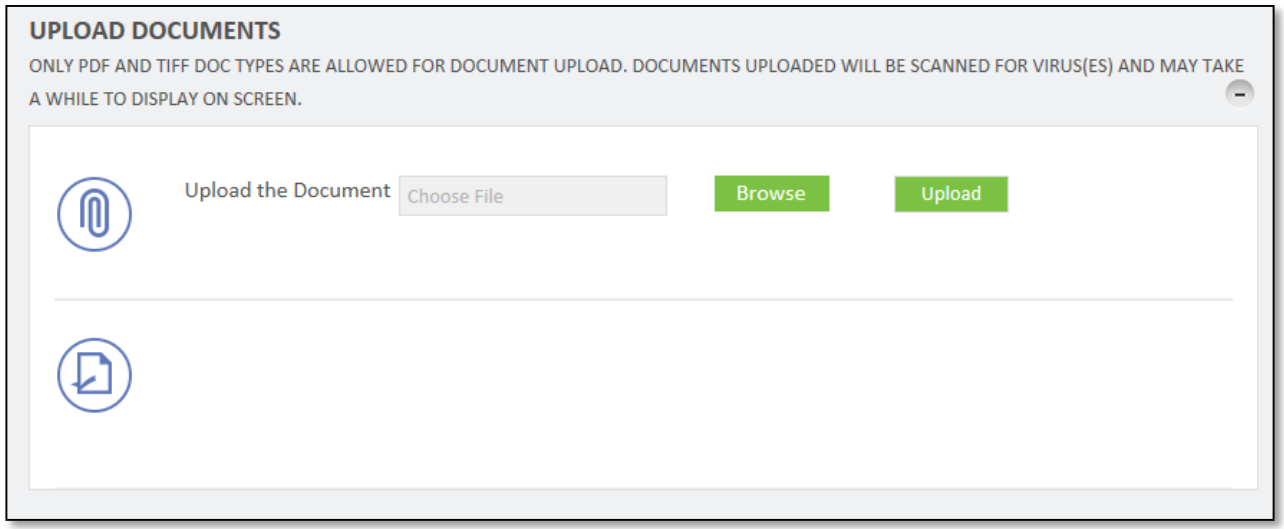
Agent's responsibilities

1. The agent can upload documents if needed



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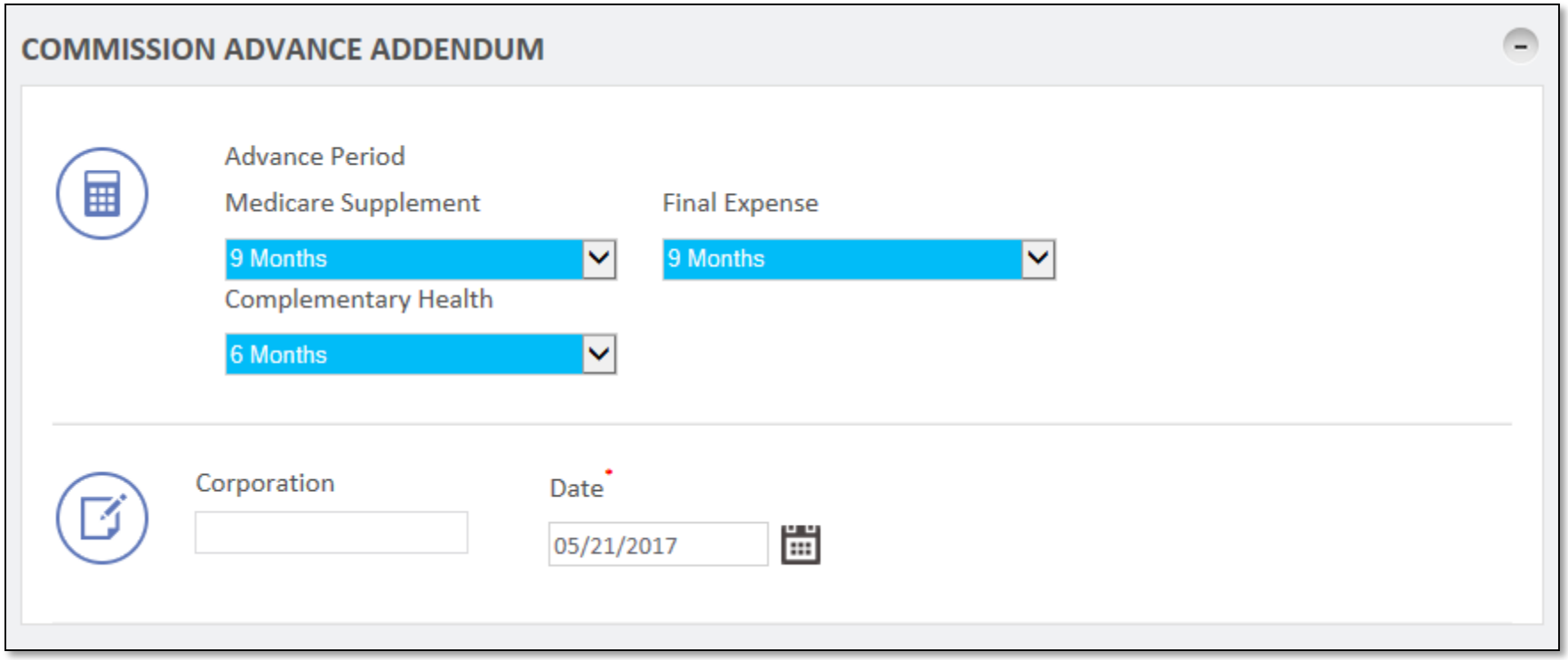
Agent's responsibilities

1. The agent can review the advancing their initiator set up.



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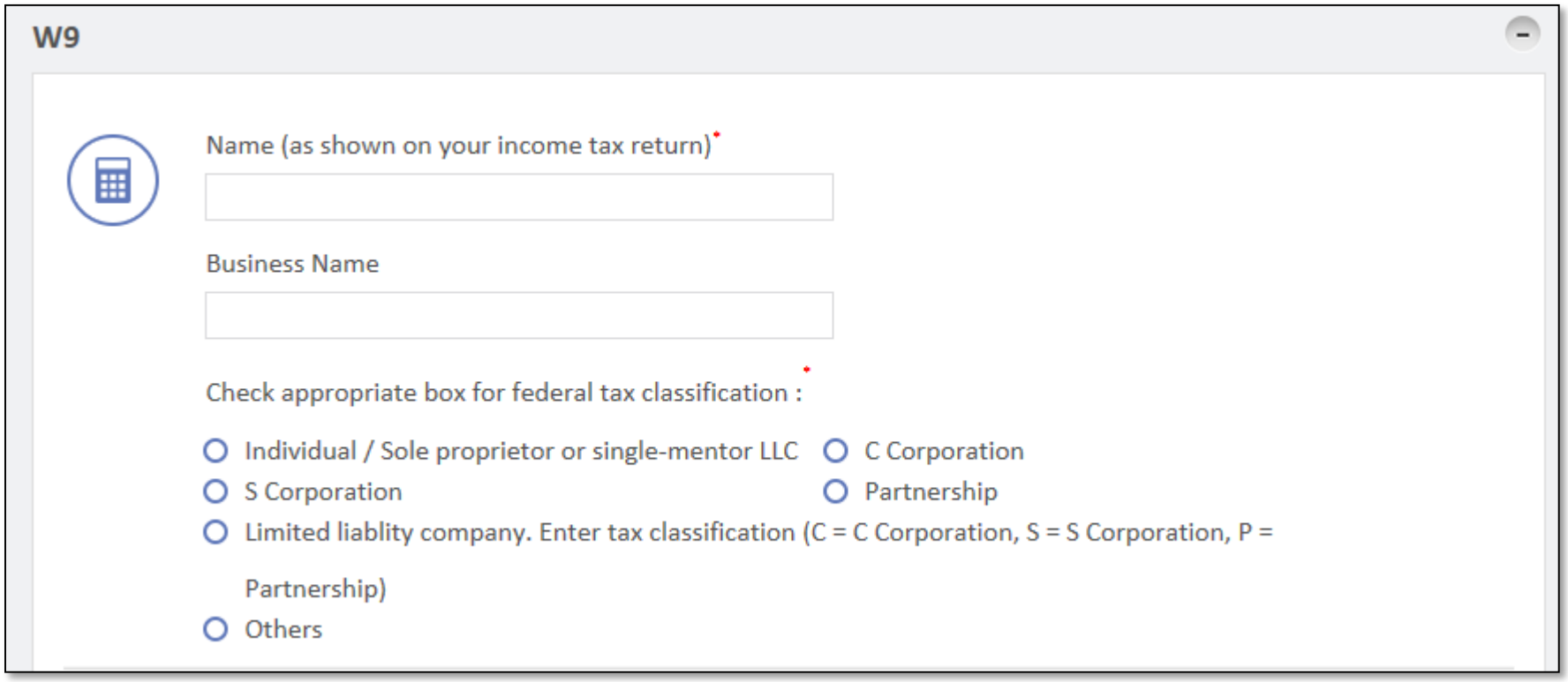
Agent's responsibilities

1. If the agent is GA or MGA, there will be W9 section to complete. LOAs will not see this section.
2. Click Continue



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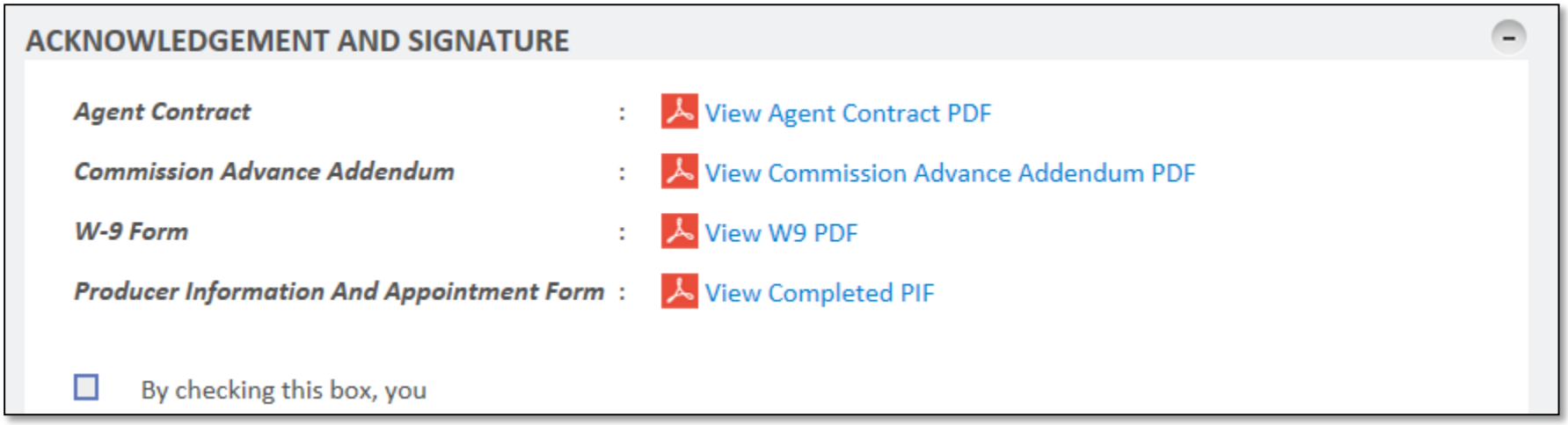
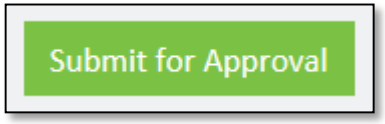
Agent's responsibilities

1. The agent will have a chance to review all information and documents
2. The agent needs to click to box agreeing to all the terms and conditions



3. Click Submit for Approval

Note: This will cause an email to go out to the approver to review all the information.



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