

**FAMILY FIRST LIFE**

# **CONTRACTING PROCESS**

**You are expected to  
complete this entire  
process within the  
next 24 hours**



# CONTRACTING PROCESS

## BEFORE WE GET STARTED, YOU MUST HAVE THE FOLLOWING:

### Errors and Omissions insurance "E&O"

The carriers require you to have E&O insurance coverage. This is to protect you in case you make a mistake and a client sues you.

### Voided Check

This is for direct deposit so you can get paid by the insurance companies.

### NPN number

This number should be known since it was just looked up in the step before this this is your National Producer number.



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# CONTRACTING PROCESS



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## BEFORE WE GET STARTED

Please keep all communication in the group chat that was created with your contracting specialist. We like to keep everyone up to date so we know your status. You are responsible to updated us in the group chat on your progress. Sending us updates like "I've completed my HCMS, I've completed my AML training, I'm contracted with Americo, etc" will help us keep track of your progress since we manage over 200 agents.

*Once you have the these four carriers let us know right away so we can get started on helping families.*

*1- Americo*

*2- Prosperity*

*3- Corebridge (AIG)*

*4- American Amicable (AML Required)*



## GETTING STARTED

### STEP 1: Check for your onboarding email

You will be looking for an email from HCMS.

The Subject line of the email will say

**"Family First Life (FFL) - Onboarding for New Agents"**




the email that it comes from is Support HCMS

[<no-reply@uppato.com>](mailto:no-reply@uppato.com)

#### **MUST HAVE TO START CONTRACTING:**

NPN (National Producers Number)  
Proof of E&O Insurance  
Voided Check

#### **CONTRACT SPECIALIST**

 Brittany Javier  
 (909) 507-4246  
 Brittany@fflscopy.com

#### **CARRIER PHONE NUMBERS**

AIG / American General  
**800-247-8837**

American Amicable  
**800-736-7311**

Americo  
**800-231-0801**

Aetna  
**800-622-3435**

John Hancock  
**877-606-7770**

Mutual of Omaha  
**800-867-6873**

Prosperity  
**877-725-4872**  
**Ext 40616**



# CONTRACTING PROCESS



## GETTING STARTED

**STEP 2: Create HCMS profile.**  
**Link is in your email**

**H**ierarchy and **C**ompensation **M**anagement **S**ystem




FFL specific software to allow our Contract Specialists to help agents request new/missing carriers, hierarchy changes & compensation changes.

**Before you are able to contract with carriers in NLC & SureLC,  
you MUST complete your HCMS profile first.**

[CLICK HERE](#)

Click link above to watch video on how to create HCMS profile

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# GETTING STARTED

## STEP 3: Create SureLC profile & upload documents

Have the following ready to upload to SureLC:

- Proof of E&O insurance
- Voided Check

\*\*\*Without these 2 documents, you will not be able to contract with any carrier.\*\*\*

**THROUGH THIS PLATFORM, YOU WILL APPLY TO THE FOLLOWING CARRIERS:**

**AVAILABLE RIGHT AWAY: Ameritas (product offered by Ethos)**

**THESE CARRIERS YOU REQUEST THE APPLICATION THROUGH YOUR HCMS PROFILE,**

**ONCE APPROVED, IT WILL BE AVAILABLE IN YOUR SURELC PROFILE:**


**Aetna, Great Western, Transamerica, Foresters**


**NOTE: You WILL receive a link to register and create your SureLC account via email, but you can also use the link we provided below as well.**


Create Account:

[CLICK HERE](#)

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 Brittany@fflskypoint.com

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# CONTRACTING PROCESS



## GETTING STARTED

**STEP 4: Contract with Americo & American Amicable, Corebridge & Mutual of Omaha through NLC**

Login to HCMS:




[CLICK HERE](#)

Follow the steps in the video to complete your Americo contract. (AmAm, MOO, Corebridge are completed the same exact way)

Click below to view video:

[CLICK HERE](#)

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# CONTRACTING PROCESS



## GETTING STARTED

### STEP 5: Contracting with Prosperity



The link to contract with Prosperity will come from your direct upline.

*You must complete AML training which will be sent from Prosperity during contracting process.*

TEXT BRITTANY to get this invite/link.

**Brittany Javier**  
**(909) 507-4246**

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

## GETTING STARTED

STEP 6: Request contracting through HCMS  
for the rest of the carriers

1. Aetna
2. Transamerica
3. Great Western
4. Foresters



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# CONTRACTING PROCESS



## GETTING STARTED

### STEP 7: Complete AML training in SureLC

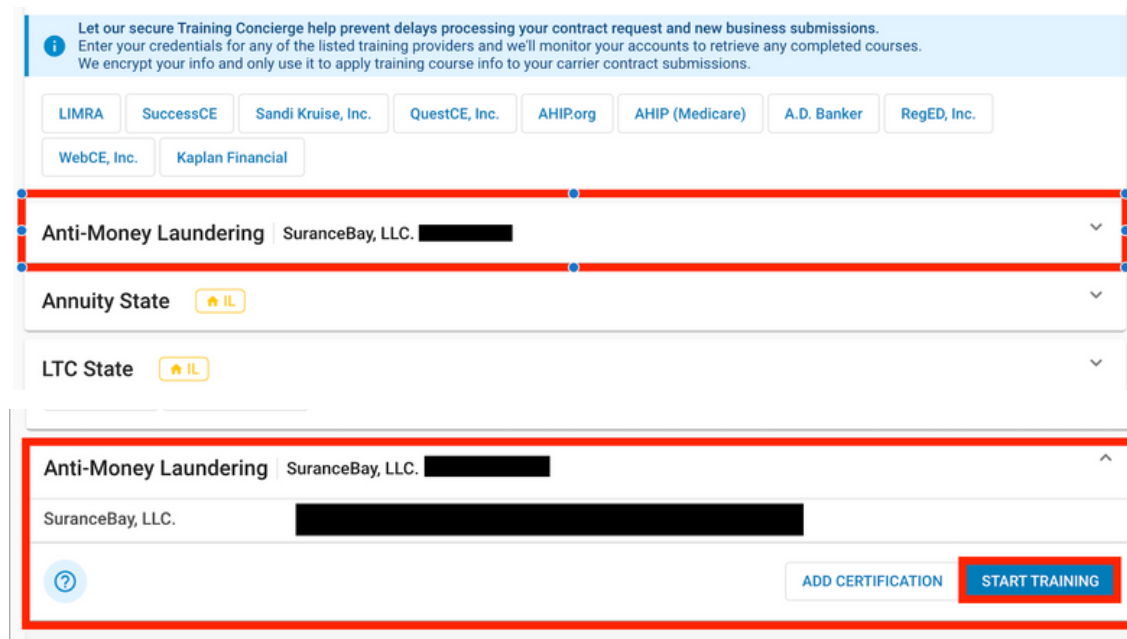
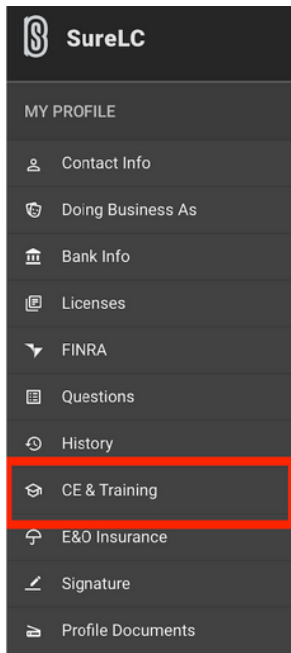
**CLICK HERE**

You can complete your FREE AML training when you sign into your SureLC account through the link above. All carriers accept this version of AML.

When you sign into your SureLC account please go to the menu on the left side.

Go to: CE & Training > Anti Money Laundering Tab > Click on AML Tab > Select "Start Training"

Shown in screen shots shown below:



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# GETTING STARTED

## STEP 8: Call Insurance Carriers 2x a week




To check on contracting and make sure it is moving smoothly along. Follow up with each carrier in 5 business days after your Contract Request changed to "Carrier" Status

- Verify they have all your contracting paperwork and that there are no outstanding requirements
- Keep an eye on your email box for important messages and contracting confirmation from the carriers
- Make sure to look in your SPAM and Promotional folders of your email

## How to follow up on contracting:

[CLICK HERE](#)

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## GETTING STARTED

### STEP 9: You will be emailed Producer Numbers

#### Receiving Writing Numbers




You will receive welcome emails from the carriers as your contracting requests are accepted

Text your writing numbers to the group chat as you receive them, so we can upload them into HCMS for you.

It is important you keep track of your writing numbers as these will be how each agent is identified for each carrier.

NOTE: your writing number will be different for each carrier.

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FAMILY FIRST LIFE

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## GETTING STARTED

**FAMILY FIRST LIFE**

*New Agent*  
**& Orientation**  
**& LEADS 101**

**FFLSKYPZOOM.com**  
NO PASSWORD NEEDED

**EVERY TUESDAY**  
**3PM - 4PM PST**

Hosted by  
**Steven Yee**  
*SkyPoint Agency*

New Agent Orientation recommended for agents going through licensing.  
Leads 101 recommended for agents going through contracting.



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