

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.

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.

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

Carrier Name	Requires Errors and Omissions Insurance (E&O)	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 set up - You will receive your writing number and instructions on how to set up your online account directly from the insurance company Write in date you received welcome email & set up your account
Accendo / CVS / Aetna	NO			Yes	
AIG / Corebridge	YES			Yes	
American Amicable (AmAm)	Only for Universal Life Product			Yes	
NOTE: AmAm does NOT use SureLC. You will receive an email with a link from onboardingspecialist@theodoreagency.com OR admin@weineragency.com					
Americo	YES			Yes	
Foresters Financial	Only for Universal Life Product			Yes	
Mutual Of Omaha (MoO) / United of Omaha	Only for Universal Life Product			Yes	
Ethos	YES			No - Business first. Must submit an application BEFORE # is assigned	
NOTE: If you have previously been contracted with Ethos before, TEXT your manager to send an email to "re-parent" with Equis Financial					
Other:					
Other:					

GPM - Government Personnel Mutual	GPM is a premier carrier and you must be eligible to contract with them, Work with your manager to see if you are eligible. Follow the instructions in Step 1 on Theodoreagency.com to start GPM's contracting process	
	After the contracting invitation is sent ** CHECK YOUR SPAM for agentonboardingnoreply@gpmlife.com**	
	GPM Writing Number: _____	
Email 1	agentonboardingnoreply@gpmlife.com	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