



SURANCEBAY
INSURANCE. SIMPLIFIED.

SureLC

Version 2.0

Requesting an Appointment

Web Version

Revision: June 15, 2013

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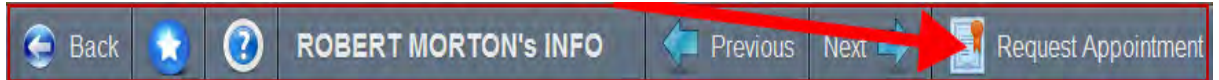
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1.0 REQUESTING A CARRIER APPOINTMENT

After your profile has been set up in SureLC, you can request contracting paperwork with any carrier.

1.1 Requesting Appointments

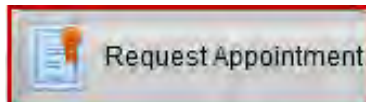
- Click on "REQUEST APPOINTMENT" in the "My Info" section.



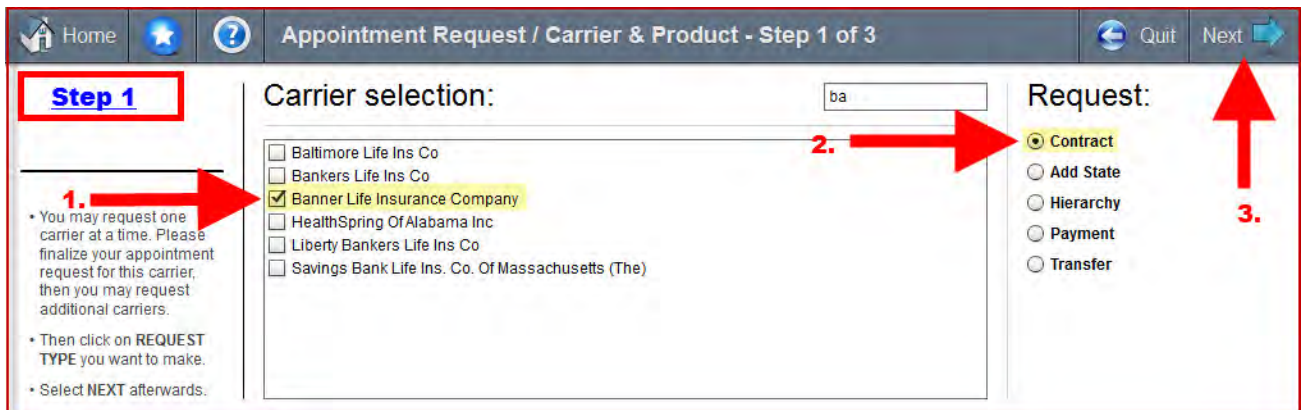
- OR, Click on the "MY APPOINTMENTS" Icon on the SureLC Desktop.



- Click on the "REQUEST APPOINTMENT" button to begin the appointment request process:



1.1.1 Step 1 - Carrier and Request Type



Step 1

1. You may request one carrier at a time. Please finalize your appointment request for this carrier, then you may request additional carriers.

2. Then click on REQUEST TYPE you want to make.

3. Select NEXT afterwards.

Carrier selection:

ba

- Baltimore Life Ins Co
- Bankers Life Ins Co
- Banner Life Insurance Company
- HealthSpring Of Alabama Inc
- Liberty Bankers Life Ins Co
- Savings Bank Life Ins. Co. Of Massachusetts (The)

Request:

- Contract
- Add State
- Hierarchy
- Payment
- Transfer

1.1.2 Step 2 - State(s) and Product(s)

Request Contract for Banner Life Insurance Company

Step 2

Licensed St...

Florida Michigan North Carolina Virginia

Products:

Variable Life:

Variable Annuity:

Long Term Care:

Group Life and Health:

Fixed Life:

Fixed Annuity:

Disability:

Accident and Sickness:

Med Supplements:

P & C:

Previous Next

1.1.3 Step 3 - Carrier Specific Questions

Request Contract for Banner Life Insurance Company to sell Fixed Life in Florida and Michigan

Step 3

Minimum Transaction Amount (min \$50): *

Commission Payment Frequency:

Daily (EFT required)

Weekly (EFT required)

Standard (3 times per month) *

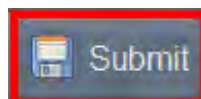
Bi-weekly (26 times per year)

Monthly

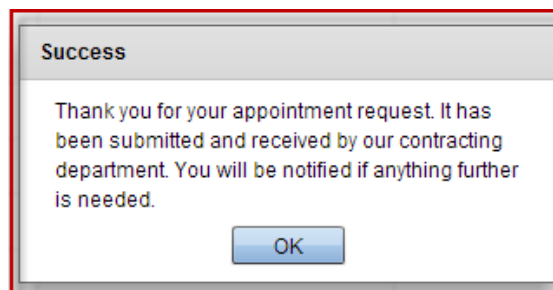
1. Required questions are highlighted in RED

Quit Previous Submit

- Select the SUBMIT Button.

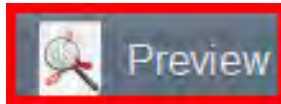


- A successful request will show the following notice.

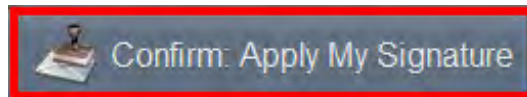


1.1.4 Step 4 - Preview & Confirm

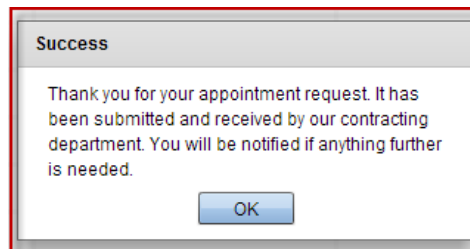
Certain Carriers require you to PREVIEW the forms prior to applying your signature. If you see the PREVIEW button below, you'll need to select it and review the contracting forms.



- Scroll through and review the page to the bottom of the file
- Select the "**CONFIRM: Apply my Signature**" button.



- A successful request will show the following notice.



1.2 Requesting Appointments (Outside of SureLC)

If you prefer not to use SureLC to submit contracting requests, contact your Marketing Organization to get paper contract copies to be completed manually.

- Send your Marketing Organization an email.
- Call your Marketing Organization directly.
- Submit new business to your Marketing Organization, which will prompt them to process appointment paperwork if you are not contracted with the carrier (non pre-appointment states only).

2.0 TROUBLESHOOTING AND FREQUENTLY ASKED QUESTIONS

2.1 Producer Training Video

[Click here](#) for a full-length demo for how to set up your profile and submit appointment requests.

2.2 Printing Problem

SureLC requires that you have Adobe Reader version 9.2 or higher. [Click here](#) to install the most recent version of Adobe Reader.

2.3 Viewing SureLC

To best view SureLC, set your monitor's resolution to 1280 x 800.

If you have any additional problems and/or questions, contact your Marketing Organization for support.



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