So, you passed your exam, AWESOME!!!!

Congratulations and welcome to your new journey! Below are the next steps you will take to get moving quickly in our virtual agent program. Should you have any questions or need assistance, then please reach out to your manager.

After You Pass Your Exam - Before Your License Is Issued

1. Apply for your state license by going to www.sircon.com or www.nipr.com Each state is a little different and may require you to use NIPR. Make sure to check in every day to see when your license is issued. Once it is issued, you should be able to print it and you will not have to wait on the physical copy. This could take anywhere from 48 hours to 2 weeks depending on the state. (Email you manager once completed)
2. Go to: https://www.nvrbranding.com/equis-financial/ and purchase the "Equis Activity Tracker". This is going to be VITAL to your business 😊
3. While you are waiting on your license, go to: https://www.equisfinancialtraining.com/new-agent-guided-startup and complete steps 1 – 5. This training series is geared towards "Field Agents" but it will bring you up to speed as to our product, setting appointments, presentation and closing the deal. Make sure to download and save all the scripts and guides in Step 2. (Email your manager once completed).
4. Go to: www.equisnow.com/agents and complete step 3 and 4 to get ready to sell. Scroll down to the Calendar. Add all the days, times and links to your phone and or calendar, and be on EVERY call to have the best chance for success. (Don't worry about the Equis Advanced training initially)
5. A business email is recommended to separate business from personal. You can create a new Gmail for free and eventually you can name your business and get a professional email with your company name.
6. Make sure you have a dedicated space from home that would allow you to work with minimal interruptions. If you can get access to a local office space, that would be optimal but not required. You will need a decent computer or laptop with adequate internet connection.

After your license is issued

1. Once you receive your license, make sure you immediately send the following to: processing@equisfinancial.com and cc your manager.
    a. A copy of your license(s).
    b. The screen shot from your AML certification from step 3 above.
    c. And copy of a voided check for deposits.
    d. Your E&O Certificate from step 4 above.
2. Once your documents are in order, Equis will send you the contracting packet. Below is a list of the carriers to get started with. If they are not in your initial contracting kit, you can log in to your Equis back office, click on the chat link and request appointment with the carriers you need:
    a. American Amicable
    b. Americo
    c. Foresters Financial
    d. GPM
    e. Aetna/CVS Accendo
3. The following carriers have to be written first before the company will appoint you:
    a. CFG – Columbian Financial
    b. Mutual of Omaha
4. For any appointment requests, applications or quoting, please refer to your Dashboard on the Equisfinancial.com website. You can also click on the "chat" link and request documents that you cannot find.

Best of luck and make sure you reach out to you manager with each step along the way!