

## New Agent Itinerary

Below are the steps you need to take to become an official team member!

### PRE-LICENSING

- Register for pre-certification course (required to sell life insurance).
  - ✓ MGA: \_\_\_\_\_
  - ✓ Email: \_\_\_\_\_
  - ✓ Phone: \_\_\_\_\_

### LICENSING

- Complete pre-certification course & meet all requirements to be approved for the life and annuities insurance exam.
- **EXAM**
  - ✓ **150 questions** are scored; **15 questions** are unscored.
    - You need **105 questions scored** correct to pass
  - ✓ Must get a 70% to pass
- **How do I register for the exam?**
  - ✓ Print out pre-licensing course certificate of completion
  - ✓ Follow steps & create account on [www.PSIexams.com](http://www.PSIexams.com)
  - ✓ Once you pass the test, apply for fingerprints for background check
    - <https://www.fastfingerprints.com>
  - ✓ Apply for license application
    - [www.insurance.ohio.gov](http://www.insurance.ohio.gov)
- **How much does licensing cost?**
  - ✓ General cost for licensing. \*Subject to change\*
    - Test: approximately \$50
    - Fingerprints: \$70
    - State License: \$25
    - Save all receipts for taxes.

### CONTRACTING

- Print physical copy of license once your license shows "approved" online.
- You are ready to complete your contract! Please have the following available:
  - ✓ One-time fee of \$50 for business cards and appointment fee
  - ✓ Professional email for business
  - ✓ Voided check for direct deposit
  - ✓ Physical copy of insurance license
  - ✓ Complete each contract page including New Agent Data Sheet & additional documents.
  - ✓ Upon contract submission, it takes approx. 1-3 business days to receive Lincoln Heritage agent number.
    - Once agent number is received, you can help clients
    - Business cards, marketing materials, and paperwork is provided free of charge once business is turned in. No shipping charges.

### LEADS

**We offer the privilege of lead financing!**

You must submit 2-3 policies or \$1500 DNP before initial financing.

Alternative option to financing leads or if unable to turn in initial business:

Purchase first lead order at cost

Use B Leads provided by manager

We have a proven lead system that eliminates countless hours and dollars you could spend doing your own marketing and advertising.

Leads are a tax write-off.

Leads are distributed by counties & states

List posted Mon-Fri via GroupMe app

TV Leads: \$41 & Direct Mail Leads: \$35.00

**FPG**

### TRAINING

- Must pass exam to be appointed with Lincoln Heritage.
- Each state takes approximately 10-14 business days to process license.
- You **MUST** check the status of your license online.
- **TRAINING begins IMMEDIATELY** awaiting state approval.
- **You will be field shadowing an agent, role playing, attending meetings, trainings and conference calls during this waiting period as well.**

**CONGRATULATIONS,  
NEW TEAM MEMBER!**