



Getting Started

Have a current AML certificate within 365 days. 2 years if it's with LIMRA. (see page 4)

Purchase E&O or have it current. E&O expires after 1 year.

www.calsurance.com/sfglife

Void check with your name on it. it is critical the name matches your ID. you can also get a direct deposit slip from your bank (see page 3)

In order for your onboarding process to be quick and efficient please have all the above documents in good order.

send these documents to melodyafp1@gmail.com for review.

Onboarding Day 1

- Complete the onboarding coming from (onboarding@quility.com). Use the same email you provided your recruiter to sign in.
- Make sure to answer all questions leaving none blank. Fill out transfer paperwork if applicable to you.
- Upload AML,E&O,Voided check or direct deposit slip to the onboarding portal.
- Contact your recruiter immediately after completing the packet.

Onboarding Day 2

- Receive welcome email from Quility. This will have credentials for OPT and HQ. Bookmark both of these websites. (see page 5)
- Calendar/Create a reminder to log in to OPT and HQ at least once every week, or it will lock you out.
- Begin Summit in HQ, most of your questions will be answered here.

Onboarding Day 3

- You will receive an email from AgentSync(no_reply@agentsync.com)
- Completion should only take 15-20 minutes. You will need copies of AML,E&O and Voided Check.
- Contact your recruiter immediately after completing agentsync.
- Within 24-48 hrs you should receive emails from different carriers confirming they are working on your contracts.

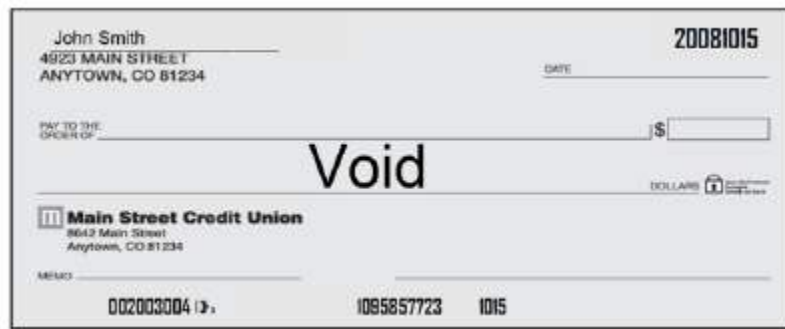
Onboarding Day 4

- Write your first application. Make sure to submit it to OPT and AirTable.(see page 5)
- Purchase your first set of B leads
- Become a New Writer ! by submitting 1 application.

Useful Tips

- See page 5 for a link to find you National Producer Number(NPN)
- To find your writing numbers go to HQ >My Profile>Licensing
- Ask your upline for the compensation graph to determine your commissions.
- Check the benefits and promotions guideline in HQ>Benefits+Promotions

EFT Examples



John Smith
4923 MAIN STREET
ANYTOWN, CO 81234

DATE: 20081015

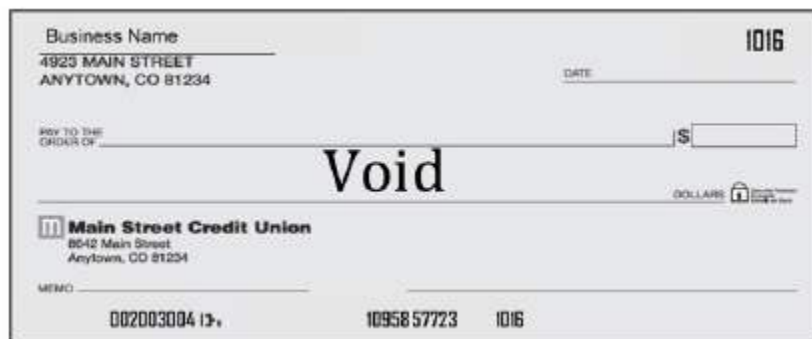
PAY TO THE ORDER OF: _____ \$ _____

Void

Main Street Credit Union
8642 Main Street
Anytown, CO 81234

MEMO: _____

002003004 13, 1095857723 1015



Business Name
4923 MAIN STREET
ANYTOWN, CO 81234

DATE: 1016

PAY TO THE ORDER OF: _____ \$ _____

Void

Main Street Credit Union
8642 Main Street
Anytown, CO 81234

MEMO: _____

002003004 13, 1095857723 1016

- The account holder's name must match the name on your application and the name printed on your banking document.
- The routing and account numbers on your application must match the routing and account numbers on your banking document exactly. Include all zeros and double check that there are no errors.
- Your banking documents cannot be handwritten. All information must be clearly printed on your voided check or bank authorization letter.
- If you are doing business as an individual, please make sure your individual name is visible on the banking document and not a business name or corporation.

Notes: Direct Deposit Slip / Online Banking/ Use the app for slip request



AML

- Must have your name.
- Course must state Anti-Money Laundering.
- LIMRA courses are good for 2 years.
- If you complete your course through LIMRA screenshot the course completion page.
- All other AML courses must be current within the last year (365 days).
- Please upload a pdf where your name and the date you completed the course is clearly visible.

Here is a source for free AML

- 1.American-Amicable www.americanamicable.com
- 2.Hover over and select Agent
- 3.Enter Agent number and Password. (Agent No. is AML and Password is Course)
- 4.Hit enter and follow instructions.
5. Save a copy of your AML certificate.

Important Links

OPT:

https://v2.sfgcrm.com/#/login?returnUrl=%2Fmyagency%23allocate_leads

HQ: [Hq.quility.com](https://www.hq.quility.com)

Air Table: <https://airtable.com/shrIK6IvXjiefbUJo>

NPN: <https://nipr.com/help/look-up-your-npn>

Training/Meeting Links

Virtual Office Link:

<https://us02web.zoom.us/j/89931491177?pwd=cTFoV3l4KoFRMXlrUE9oNXQ3NklxUT09>

Monday: Alvarado Baseshop and once a month Alvarado Master. 10:00AM

Link: Virtual Office Link

Tuesday: Training Call 1:30 PM

Link: Virtual Office Link

Wednesday: National Call 9:30 AM

Link: <https://zoom.us/j/571684240#success>

Wednesday: Closers Corner 2:00PM

Link: <https://us02web.zoom.us/j/85374242136>

Thursday: Training Call 1:30 PM

Link: Virtual Office link

Friday: Smith Master 9:00AM

https: <https://zoom.us/j/772514841#success>

Saturday: Phone Training 8:00 AM

Link: Virtual Office Link

