

LOG IN INFO IS AS FOLLOWS AND IS CASE SENSITIVE:

User Id is _____
Password _____

If you choose to change your password, we will not be able to see it in the future. Please keep it in a safe and secure location.

DETAILED UNDERWRITING AND MANUAL RATING FOR OUR SPECIFIC PRODUCTS:

- Go to agent website
- Click on training tab-**Do not hit the product portfolio tab underneath** – just the training tab
- Under agent training and rate guides
- Pick the specific product you want to learn about

TO ORDER SUPPLIES YOU CAN FOLLOW THESE INSTRUCTIONS:

- Go to the Supplies Tab
- Go to Applications & Underwriting
- Then you can order any amount you want up to 25
- You will notice there are different application numbers for state specific needs-
- If you go to Sales and Marketing tab
- Click on required forms by product/states - Use this if you not sure what form #'s to order or are needed for each state.

TO PRINT APPLICATIONS AND FORMS:

- Go to agents service center
- Go to Underwriting forms
- Find form needed – description and form # 's are listed
- Hit on the blue “blank form” next to the one you want – this will pull up an adobe form you can print.

TO CHECK STATUS OF PENDING BUSINESS OR COMMISSION REPORTS:

- Go to reports tab
- Click on appropriate link underlined in blue to open report
- It should pre-fill your agent code – if not use the drop down tool next to tab and pick your agent code
- Use drop down tabs to modify dates or other info as needed-
- Hit view report button to run reports

TO RATE OUR SIMPLIFIED ISSUE/GRADED DEATH POLICY:

- Go to sales and marketing tools tab
- Go to illustration software
- Go to premium calculator link – this will open and Excel rating form-
- Modify face value, age, class, mode and it will produce premium including the policy fee.

ADDITIONAL REFERENCE GUIDE –

- **Agent Website** – Will only have rating capabilities for out Simplified Issue Whole Life/ Graded Death Benefit policies- As applicable to your writing state(s) based of licensing submitted to our compliance dept..
- **Agent Website** – Use this for Product Information training, Printing of Applications and Forms, Printing Approved Marketing Material and Brochures, Annuity Interest rates, A listing of State Specific Forms needed with applications, for each product, Reports.
- **Life Portraits**- CD included in New Agent Welcome Kit will be the main automated rating tool you will use. Again it will only rate products available in your writing state(s).
- **New Business** UW Fax # 866-862-1070
- **Underwriting** Questions Phone # 1-800-770-4561 extension 8262
- **Sales Support** Questions 1-800-770-4561
- **Member Benefit** General Information 1-800-627-4762
- **Lic** Fax # 512-418-3395
- **Status of pending applications** 1-800-770-4561
- **Commission** questions – depends on your specific contract with MGA
- **Form 150-P Summary of Insurance and Annuity Plans**
- **Form 150-R Basic Underwriting Guidelines**
- Form 10043 Express Selling Process Information
- Form 2960 Member Benefits Brochure