BANKERS life

Pre-Contract Agent Guide

laguna hills

Branch Satellite Office #1040

For the life of your retirement

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[Hello!]

Welcome to Bankers Life and Casualty Company - Laguna Hills Branch Office 1040! This guide contains information which will facilitate the transition into the role of Insurance Sales Representative.

In order to support career development while maintaining Banker's Compliance Standards, please use this guide to assist in the appointment process.

If you have any questions please see the Branch Office Administrator (BOA) or Unit Sales Manager (USM) for clairifaction.

[Requirement Checklist]

- ☐ Provide BOA with Drivers License
- ☐ Provide BOA with proof of CURRENT Auto Insurance
- ☐ Provide BOA with a copy of CA Department of Insurance License
- ☐ Read, sign, and return Attestation Page to BOA
- ☐ Read, sign, and return Declaration Page to BOA
- ☐ Read, sign, and return FSP Deduction Authorization to BOA
- ☐ Complete Nomoreforms Pt. 1 6100agtapp
- ☐ Complete Nomoreforms Pt. 2 6100agt
- ☐ Complete All Pre-Contract Modules (details attached)
- ☐ Meet with USM - Choose date/time to complete CNAS Course
- ☐ Complete 8 Hour Long Term Care Course (details attached)
- ☐ Complete 8 Hour Annuity Course (details attached)
- ☐ Submit 8 Hour Course Certificates to BOA
- ☐ Order Business Cards Upon Receipt of Bankers E-mail account information

Note: All training MUST be completed within thirty (30) days of receiving an agent number.

BANKERS
LEARNING NETWORK

[Pre-contract Modules]

Check the personal e-mail account provided to the BOA for an e-mail from Bankers Learning Network (BLN) and Virtual Coach. These e-mails contain information that will grant access to the Pre-Contract Modules.

The Pre-Contract Modules are Bankers-specific courses designed to educate new agents about products, policies, and procedures.

ALL TRAINING MUST BE COMPLETE WITHIN 30 DAYS OF APPOINTMENT

Bankers CORE Products:

STEP 1: Log into www.bspn.bankers.com or if you have not yet received an agent number, you will need to access the portal through https://bankers.pinpointglobal.com/Apps/BLN_FDP/login.aspx

STEP 2: Click on the LEARN tap at the top of the screen

STEP 3: Click on the REQUIRED TRAINING

STEP 4: The flowing pop-up screen will appear:

Click on all the following categories
And additional Menu window will appear
Click on each segment and complete all courses

NOTE: After finishing each course you must click on the after completing each segment/course/category to receive a indicating the work is recorded.

BANKERS
LEARNING NETWORK

[Pre-contract Modules]

REQUIRED TRAINING:

These courses must be completed by all agents in order to submit business.

These courses should be complete within the FIRST TWO (2) WEEKS of Pre-Contract Agent Status.

Completed		Course	Date Completed	Last Completed
☐	ⓘ	Bankers Life Insurance -1200		
☐	ⓘ	Bankers Medicare Course -1300		
☐	ⓘ	Bankers Long Term Care Course -9800		
☐	ⓘ	Bankers Annuity Course -9103		

BANKERS
LEARNING NETWORK

[Pre-contract Modules]

NEW AGENT SUCCESS TRAINING (NASv)

These courses are designed to supplement the live NAS training provided to all agents within 30 days of being contracted.

NASv Training MUST be complete within 45 days of becoming contracted.

*Credit for the NAS3010 Course & Agent Compliance Guide will be manually assigned by the BOA

Completed		Course	Date Completed	Last Completed
		Required Training Credit -9000		
		NAS - 3010		
		HIPAA Goes HITECH - 4000		
		Agent Compliance Guide 2011 - 3091		
		Compliance as a Competitive Edge Online Course - 3050 and 3051		
		Anti-Money Laundering - 3060		
		Sales Involving Securities Online Course (Agent) - 5108		

BANKERS
LEARNING NETWORK

[Pre-contract Modules]

APPLICATION SUBMISSION FOR ANNUITIES:

These courses must be complete before submittal of an annuity application.

Completed		Course	Date Completed	Last Completed
		Annuity Suitability - 9132		
		Understanding PBIA and GrowthPoint Annuity Products - 9105		
		EIA LA-07C - 9110		

Pre-contract Modules

APPLICATION SUBMISSION FOR LONG TERM CARE:

These courses must be complete before submittal of a Long Term Care Application.

***Note that Course Short Term Care 560, 565-9700 is OPTIONAL**

Completed		Course	Date Completed	Last Completed
		Short Term Care 560, 565 - 9700 (optional only not required)		
		LTC Comprehensive Plans 340, 350, 370, 380 – 9842 (California Only)		

Pre-contract Modules

MEDICAL AND PARTNER APPLICATIONS:

These courseS are required ONLY if you plan to sell any medical or partner (MA, PDP) applications.

Please discuss these options with a Unit Sales Manager.

Application Submission Medical

These courses must be taken to submit medical Application

Completed		Course	Date Completed	Last Completed
☐		Senior Health Indemnity Product (SHIP) - 1401		
☐		Humana Dental and Vision - 1482		

Application Submission Partner Courses (MA, PDP)

These courses must be taken to submit partner (MA,PDP) Application

Completed		Course	Date Completed	Last Completed
☐		Aetna 2014 - 1464		
☐		UnitedHealthcare 2014 - 1471		

[NASV WORKSHOP]

New Agent Success Training (NASv) is comprised of a one-week workshop, weekly training sessions hosted at BSO 1040, and online training courses.

The NASv Training helps to introduce the Bankers Sales Model and provide agents with knowledge and tools to be successful in the field.

Please see a Unit Sales Manager to plan a time and date to atttend NASv, and gather the required materials for training.

NASv CLASSROOM TRAINING

NASv "Virtual Clock" Training
Hosted at BSO 1040

[Continuing Education]

8 Hour Long Term Care & Annuity Certificates

Bankers Life & WEBCE have partnered to provide a discount on any state-specific Continuing Education Courses.

WEBCE offers an "All Access Pass" for $36.95 to Bankers agents who need to take fulfill these state-required credits in order to sell certain Bankers products.

STEP 1: Log into www.bankerslife.webce.com

STEP 2: Click on Sign In

STEP 3: First time users must create login in profile
Note: For all future login profiles that you create regarding Bankers and Insurance, it is helpful to use your bspn login information for all, which will eliminate forgetting access information to certain accounts.

STEP 4: Pay for your All Access pass for $36.95. (This pass will be good for an entire 12 month period and can be used to purchase as many course as you wish)

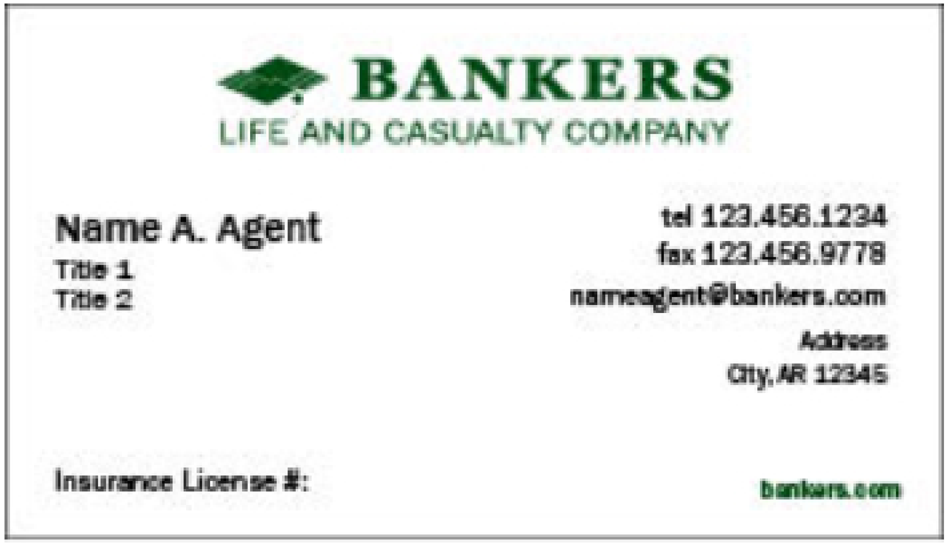
STEP 5: Complete the CA-8hr Long Term Care course and print certificate
Complete the CA-8hr Annuity course and print certificate

STEP 6: Give a copy of LTC and Annuity certificates to your BOA for processing

[Business Cards]

Business Cards MUST be ordered within TWO WEEKS of being contracted by Bankers Life & Casualty Company.

Please Visit our Copy Room to pick up a business card order form and turn in the complete form to the Branch Office Adminstrator.


BANKERS
LIFE AND CASUALTY COMPANY
Name A. Agent
Title 1
Title 2
tel 123.456.1234
fax 123.456.9778
nameagent@bankers.com
Address
City, AR 12345
Insurance License #:
bankers.com


For the life of
your retirement
Also representing
Colonial Penn Life Insurance Company,
an affiliate of Bankers Life and Casualty Company.