



# LEGACY LIFE

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NEW AGENT GUIDE

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**WELCOME TO LEGACY LIFE**

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# SIGN UP WITH OUR AGENCY

## 1 GET YOUR NAA#

1. Go to <https://register.naaleads.com/>
2. Fill in the information
3. Put your sponsor's NAA# under where it says: 'Recruiter'

**\*PLEASE MAKE NOTE OF THE PASSWORD YOU SET UP, YOU WILL NEED IT LATER\***

4. Continue the prompts to [Thealliancecontracting.com](http://Thealliancecontracting.com)
5. When registration is complete you will receive a text message with a one-time pin

## 2 COMPLETE AGENT AGREEMENT

### Congratulations!

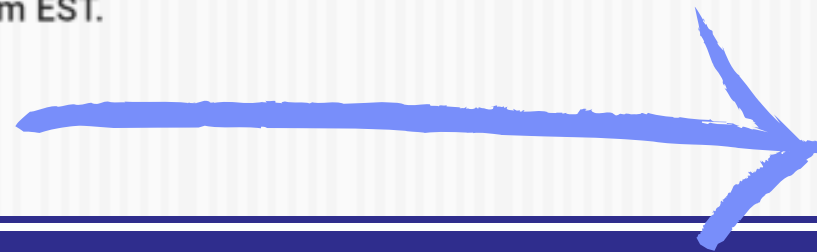
Welcome to the team, **Pepper Puppy!**

Your Agent Number/Username is: **NAA502098**

#### Next Steps:

1. Click the button below to continue to the Contracting website.
2. You will receive a text message with a PIN ID to verify your registration.
3. Follow the Getting Started steps to complete your Agent Agreement and officially become an agent with The Alliance.

If you have any questions, please contact us by sending an email to [help@naaleads.com](mailto:help@naaleads.com) or by calling (866) 934-3941 Monday through Friday from 8am to 5pm EST.



**GO TO CONTRACTING**

6. Follow the steps under Getting Started once logged in to [Thealliancecontracting.com](http://Thealliancecontracting.com)

For Licensed Agents we will import your license information from NIPR once the Agent Agreement is signed.

For Non-Licensed agents this information will be pulled when you begin your first carrier contract.

(please note it can take 3-5 business days for NIPR to receive your information from your state)

If your license information is not available in NIPR you may add it manually on the Licenses page



# REGISTER FOR XCEL

**You'll need to complete the pre-licensing exam before you can take your state license test**

**Life & Health Pre-licensing Education**  
**ONLY \$49.99**

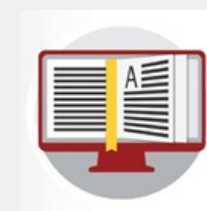
**DISCOUNT CODE: LEGACYLIFE**

## Life & Health Prelicensing Registration:

1. Visit [partners.xcelsolutions.com/legacylife](https://partners.xcelsolutions.com/legacylife) then **ENROLL NOW**
2. Choose **INSURANCE PRE-LICENSING BUNDLE** then select your **STATE OF RESIDENCE**
3. Select a course:
  - Life & Health
  - Life
  - Health
4. Apply the discount code: **LEGACYLIFE**
5. **Proceed to Checkout** then select **SIGN UP**
  - Only enter the **\*REQUIRED** student info
  - Verify your info is correct to complete registration
  - A welcome email is instantly sent to help you get started!

*\*Additional state fee may apply*

## Your Package Includes:



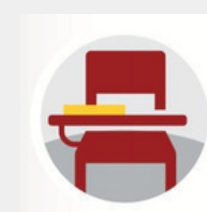
### Pre-licensing Course

Each chapter contains High-Def intro & summary videos, as well as succinct reading material. After all chapters are complete, take the course's final exam.



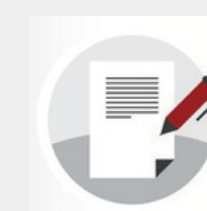
### Prep Review Course

This review course will go over every key concept & question in each chapter that will be on the state licensing exam.



### State Exam Simulator

These full-length practice tests will simulate the state licensing exam to help get into test day mode.



### Cliff Notes

Downloadable/printable version of the review course. Located above Chapter 1 in the "Resource" tab.

**For more instruction go to**  
**[Legacylife.co/join](https://Legacylife.co/join)**





# Pass The Test Fast & Get Your State License

## PASS YOUR TEST FAST

WATCH THIS VIDEO AND FOLLOW WHAT ONE OF OUR TOP AGENTS DID TO PASS THE TEST IN THREE DAYS:

[WWW.LEGACYLIFE.CO/EXAMFXTIPS](http://WWW.LEGACYLIFE.CO/EXAMFXTIPS)



## FIND OUT WHAT YOUR STATE REQUIREMENTS ARE

- GO TO: [HTTPS://EXAMFX.COM/INSURANCE-PRELICENSING-TRAINING/VIEW-INSURANCE-STATE-REQUIREMENTS](https://examfx.com/insurance-prelicensing-training/view-insurance-state-requirements)
- FOLLOW DIRECTIONS FOR OBTAINING YOUR STATE LICENSE AND MEETING YOUR STATE REQUIREMENTS
- MOST STATES REQUIRE A SCORE OF 70% TO PASS THE TEST

# PASS



## YOU'VE PASSED YOUR TEST? NEXT STEPS

- MOST STATES REQUIRE A BACKGROUND CHECK AND FINGER PRINTS
- FOLLOW THE LINK AT THE BOTTOM OF THE EMAIL/PRINT OUT YOU RECEIVE ONCE PASSING THE TEST TO BEGIN THE LICENSING PROCESS
- THE LICENSING PROCESS USUALLY TAKES 1-2 BUSINESS DAYS
- KEEP AN EYE ON YOUR EMAIL FOR UPDATES
- ONCE YOU HAVE YOUR LICENSE AFTER 1-2 DAYS YOU WILL BE ABLE TO SEARCH FOR YOUR NPN - NATIONAL PRODUCER NUMBER NEEDED FOR CONTRACTING (INSTRUCTIONS ON PG6)



# PRE-CONTRACTING

## Anti-Money Laundering (AML) & Omissions & Errors Insurance (E&O)

### AML 1

Alliance AML

Log on to <https://naauniversity.com/>

- Select Courses > Free Courses
- Select Anti Money Laundering (AML) Course
- Add to cart and "purchase" free course
- Select "Courses"
- AML will now be available to take

### AML 2

Limra AML

Once you submit your carrier contracting with Mutual Of Omaha or AIG, the ability to complete the LIMRA AML course will be open within a couple of days:

<https://knowledge.limra.com/LimraLogin.aspx>

- Select AML Training (Username is your NPN. Password is your last name in all lower-case letters).
- Once you complete the course, send a screenshot of your completion to [contracting@naaleads.com](mailto:contracting@naaleads.com) You might need the screenshot to send to certain carriers.

### E&O

Log into <https://arc.naaleads.com/>

- Select Resources
- Select E&O Insurance
- You will be redirected to the E&O affiliate site we have with NAA.

Follow prompts to enroll.

<https://www.calsurance.com/naaeando>

**E&O coverage is required for some companies, and NOT required for others. For larger policies such as IULs and annuities it is REQUIRED.**

**If you are unable to get it immediately, you can contract with some companies and come back to this step later on**



# CONTRACTING

**GET  
YOUR  
NPN**

National Producer Number LOOKUP:  
<https://nipr.com/help/look-up-your-npn>

**\*\*YOUR NPN MAY TAKE 24-48 HR AFTER RECEIVING YOUR STATE LICENSE\*\***

## SUBMIT CONTRACTS

Log onto [thealliancecontracting.com/](http://thealliancecontracting.com/) log in with your NAA # and password that you created.

**\*\*UNDER AGENT PROFILE CONFIRM YOUR INFORMATION & ANSWER THE BACKGROUND INFORMATION QUESTIONS \*\***

**\*\*UNDER MY WALLET INPUT ALL YOUR BANKING INFORMATION. THIS IS WHERE YOUR COMMISSION CHECKS WILL GO\*\***

**\*\*UNDER DOCUMENTS UPLOAD YOUR AML CERTIFICATE AND YOUR E&O CERTIFICATE\*\***

Complete the these carrier contracts Under Contract Requests

- a. CVS/Aetna Med Sup
- b. Aflac
- c. Occidental Life/ American Amicable
- d. Citizens
- e. Royal Arcanum
- f. Foresters
- g. Mutual Of Omaha
- h. Transamerica
- i. AIG/Corebridge
- j. Americo
- k. Royal Neighbors
- l. F&G



# CARRIER SET UP

You will need to set up agent portals with the following carriers:

Transamerica  
Foresters  
Royal Neighbors  
AIG/Corebridge  
American Amicable/Occidental  
CVS  
Americo  
F&G  
Citizens

Mutual of Omaha &  
Foresters do not require  
agent portal to submit  
business



If you haven't - complete your LIMRA AML Training Course. See page 6 for instructions

**CREATE A DOCUMENT TO STORE EVERY USERNAME, AGENT ID, WRITING CODE ETC THAT THE CARRIERS SEND YOU AND THE PASSWORDS YOU CREATE FOR THOSE ACCOUNTS. YOU WILL NEED ACCESS TO THESE ONCE YOU ARE IN A CLIENT'S HOME**





# NEW AGENT COURSE

While you're waiting for your contracts with insurance companies to get approved, stay plugged in and begin utilizing our system

## Complete New Agent Course

[legacylife.co/agentportal](https://legacylife.co/agentportal)



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[Passing the Test](#)

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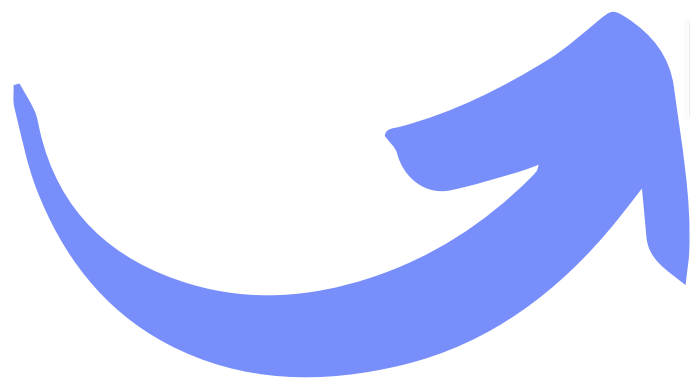
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## New Agent Course

### What you'll learn in the Fast Start Course

Having a mindset for success

Types of Leads

How to build your ideal schedule

How to Dial Effectively

How to Run in Home Appointments

Overcoming Objections

The Different Products We Offer

What to Bring on Your First Appointment

Going Partner and Building An Agency

and lots more....

[JOIN THE COURSE](#)

Need More Help?  
Reach out to us!



Follow and complete the new agent course while you wait for carrier writing numbers.. This will get you ready to be in the field and prepared to accomplish your goals





# NEXT STEPS

While you're waiting for your contracts with insurance companies to get approved, stay plugged in and begin utilizing our system

## 1 Complete New Agent Course (see above)

[legacylife.co/agentportal](http://legacylife.co/agentportal)

## 2 Plug into Team Calls

Monday Sales Training: 9pmEST/8pmCST/7pmMST/6pmPST

Thursday Night Presentation: 9pmEST/8CST/7MST/6PST

<http://Zoom.us/j/96651590834>

## 3 Get Connected

Telegram Group - Link to Join:

<https://t.me/+spRyPBdrtZM3ZGFh>

## 4 Register for the Next Training Event

<https://theallianceevents.com/>

## 5 Reach out for Help

Legacy Life Office Manager - Bene' Closson  
336.693.8402

Email: [Bene@legacylife.co](mailto:Bene@legacylife.co)