



New Agent Checklist

Licensed Agents

_____ Purchase Errors & Omissions Insurance through one of the following:

You can chose from any carrier. We recommend using

<https://www.360coveragepros.com/ffl/errors-and-omissions>

_____ Sign up to contract with carriers. See instructions in contracting email sent to you by your admin.

You will start with Americo, Mutual of Omaha,, John Hancock, and AIG.

_____ Contact your admin when all points above have been completed for additional instructions

_____ Sign in to New Agent Portal at www.fflheritage.com to complete training and get additional info

_____ Complete new agent bootcamp. <https://familyfirstlifewagentbootcamp.com/p/gettingstarted>

_____ Complete The Process packet located on the agent portal on <https://fflheritage.com/new-agents/>

_____ Contact your admin when you have completed the training so that you can receive instructions on how to get additional carriers.

_____ Reach out to your manager to set up and lead strategy