New Agent Checklist

Thank you for your interest in becoming appointed with us. Starting from day one, we want to make doing business with us easy. We've put together the following checklist to help ensure all required paperwork is submitted to avoid processing delays.

- ❑ The Prospective Agent's Application and Profile (With Power to Appoint) and Direct Deposit of Commissions Authorization Agreement are **required forms**.
- ❑ Include a **voided check** with the Direct Deposit of Commissions form.
- ❑ An **e-mail address** must be provided in Section I of the Prospective Agent's Application and Profile.
- ❑ Include copies of **current licenses in states you wish to be appointed**.
- ❑ Provide **Anti-Money Laundering** Certification of Training. We accept completed training from the following:

  • Cambridge Investment Research, Inc. • CUNA Brokerage Services, Inc. • FINRA • Financial Network Investment Corporation • ING • John Hancock • Kaplan Financial • Lincoln Investment Planning • Money Concepts • National Planning • Pension Planners • Raymond James • Reg Ed • SWBC Investment Services • Web CE
- ❑ Forward completed forms to the **Appointing Agent for signature**.

Please fax completed paperwork to **(513) 412-5144, Attn: Contracting**. You will be notified by e-mail once you may begin to solicit business. Thank you for your business!

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