

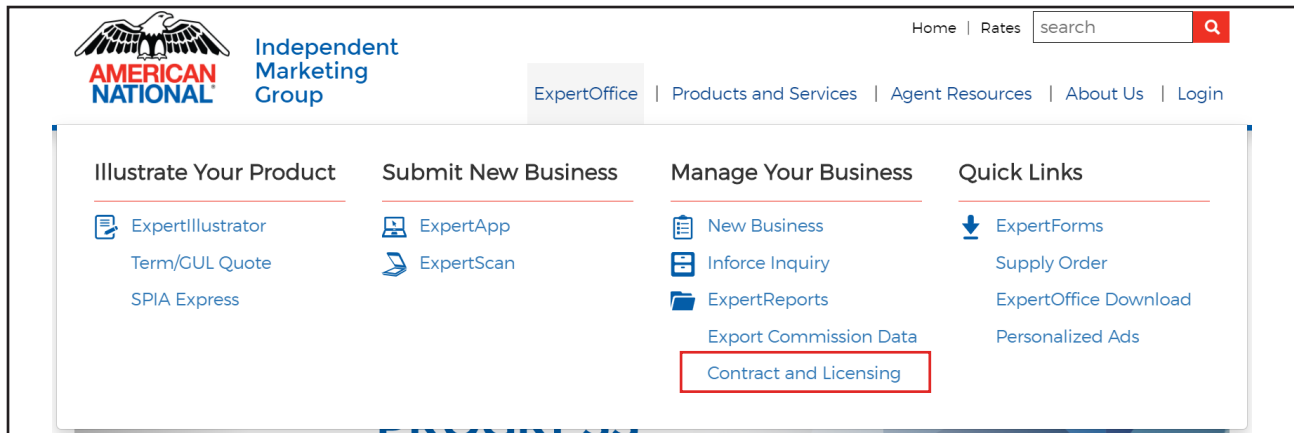
# QuickStart Guide

## Agency Guide: Contract & Licensing Portal



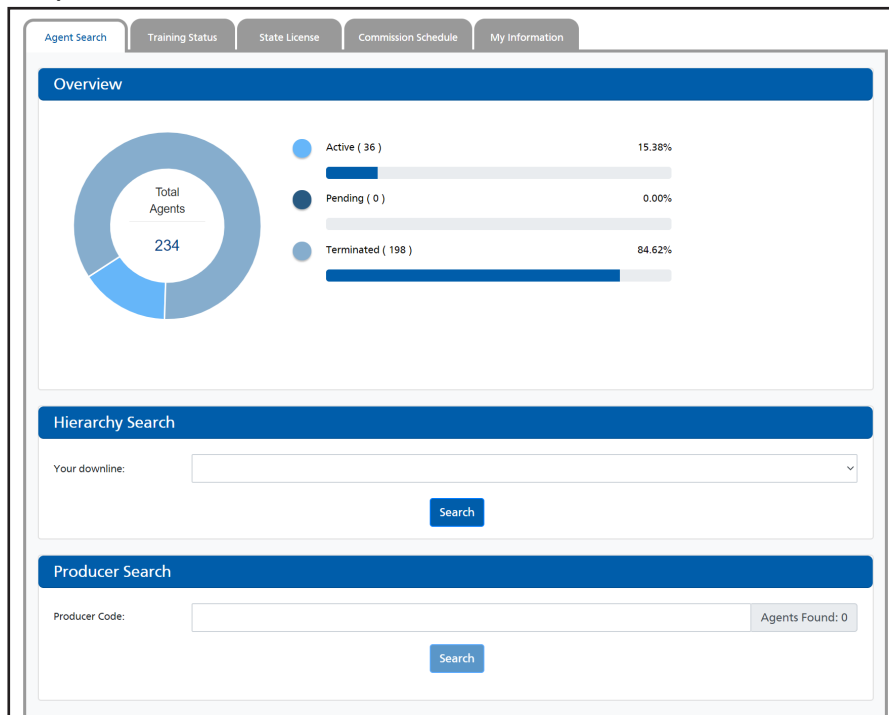
### 1 Access the Portal

Within the ExpertOffice mega menu the **Contract & Licensing** link is located under the **Manage Your Business** section.



### 2 Contract & Licensing Dashboard

When the agency first opens the portal, they will access their dashboard with the **Agent Search** tab. This interactive dashboard displays an overview of active, pending, and terminated agents. The agency also has the ability to quick search agents with a drop down or producer code.



### 3 Agent Lists

By selecting active, pending, or terminated within the interactive dashboard displayed previously; the agency can access each list separately. Within the agent list, the agency can see at quick view of each agent. This quick view provides the agency with the name, producer codes, login ID, and much more!

The screenshot shows a web interface with a navigation bar at the top containing tabs for 'Agent Search', 'Training Status', 'State License', 'Commission Schedule', 'My Information', and 'Agent List'. The 'Agent List' tab is active. Below the navigation bar is a blue header for 'Active Agents'. The main content is a table with the following columns: Agent Name, Producer Code, Resident State, Line of Authority, Login ID, Contract Code, and Effective Date. The table contains 10 rows of agent data. At the bottom of the table is a pagination control with buttons for 'First', 'Previous', '1', '2', '3', '4', 'Next', and 'Last'. The '1' button is highlighted, indicating the current page.

Agent Name	Producer Code	Resident State	Line of Authority	Login ID	Contract Code	Effective Date
[REDACTED]	[REDACTED]	TX	LH	[REDACTED]	GA	04/08/2019
[REDACTED]	[REDACTED]	AR	L	[REDACTED]	AGT	01/01/2020
[REDACTED]	[REDACTED]					
[REDACTED]	[REDACTED]	FL	LH	[REDACTED]	SOL	04/25/2016
[REDACTED]	[REDACTED]	AR	L	[REDACTED]	AGT	08/08/2016
[REDACTED]	[REDACTED]	AR	LDH	[REDACTED]	AGT	09/05/2012
[REDACTED]	[REDACTED]	AR	L	[REDACTED]	AGT	12/10/2012
[REDACTED]	[REDACTED]	AR	L	[REDACTED]	AGT	12/01/2018
[REDACTED]	[REDACTED]	AR	L	[REDACTED]	AGT	09/06/2017
[REDACTED]	[REDACTED]	AR	LH	[REDACTED]	AGT	11/20/2017

## 4 Agent Detail

By selecting an agent's name from the agent list or searching from the dashboard the agency can access the **Agent Detail** view. This screen provides the agency with specific agent information, product training and state continuing education status.

**Agent Detail**

### Overview

Name:	[REDACTED]
Login ID:	[REDACTED]
Producer Code:	[REDACTED]
Contract Code:	[REDACTED]
Contract Effective Date:	[REDACTED]
Lines of Authority:	Life-Health
Resident state:	TX
Advances:	No
State Licenses:	TX,

### Product Training

ANICO ASIA PLUS FLEXIBLE PREMIUM ANNUITY	Completed	02/04/2020
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### State Continuing Education

TX Annuity Suitability Continuing Education	Completed	03/12/2018
TX Annuity Suitability Continuing Education	Completed	03/26/2018
TX Annuity Suitability Continuing Education	Completed	03/29/2018

## 5 Training Status

The **Training Status** tab located at the top contains the training for the agency. Within the tab the agency can see the status of trainings they have taken for company specific and continuing state education. If the agency wants to view a specific agent's training status, that is located in agent details and was mentioned previously in this guide.

The screenshot displays a web interface with a navigation bar at the top containing tabs: Agent Search, Training Status (selected), State License, Commission Schedule, My Information, and Agent List. Below the navigation bar is a section titled "Product Training" which contains ten individual training cards. Each card lists a training title, its status (all are "Completed"), and its completion date. The training titles are: ANICO Equity Indexed Annuity, ANICO Strategy Indexed Annuity 7 & 10, ANICO Strategy Indexed Annuity Plus, Palladium Century Annuity, Palladium Multi Year Guaranteed, Palladium Advisor Annuity, Palladium Single Premium Immediate Annuity Series, Value Lock EIA 7 & 10, WealthQuest Citadel 5 & 7, and ANICONY Strategy Indexed Annuity Plus. Below the "Product Training" section is a section titled "State Continuing Education" which contains the text "No Training Information found."

Training Title	Status	Completion Date
ANICO Equity Indexed Annuity	Completed	05/30/2014
ANICO Strategy Indexed Annuity 7 & 10	Completed	05/30/2014
ANICO Strategy Indexed Annuity Plus	Completed	05/30/2014
Palladium Century Annuity	Completed	05/30/2014
Palladium Multi Year Guaranteed	Completed	05/30/2014
Palladium Advisor Annuity	Completed	05/30/2014
Palladium Single Premium Immediate Annuity Series	Completed	05/30/2014
Value Lock EIA 7 & 10	Completed	05/30/2014
WealthQuest Citadel 5 & 7	Completed	05/30/2014
ANICONY Strategy Indexed Annuity Plus	Completed	05/01/2014

**State Continuing Education**

No Training Information found.

## 6 State License

The **State License** tab includes all of the agencies state licenses we have on file. Plus the line of authority, effective date, expiration date, and the current status.

State	Line of Authority	Effective Date	Expiration Date	Status
AK	Life-Health	01/01/2016	01/06/2021	Active
AL	Life-Disability-Health	01/04/2008	01/31/2020	Active
AR	Life-Disability-Health	01/01/2016	01/30/2020	Active
AZ	Life-Disability-Health	01/01/2016	01/31/2021	Active
CA	Life-Disability-Health	01/01/2016	01/30/2020	Active

## 7 Commission Schedule

As an agency there may be multiple commission schedules available due to multiple down-line agents. Access each commission schedule in the **drop-down box** located at the top of the screen with the **Commission Schedule** tab.

Selected contract code: ▼

Current Previous

1 of 4 Automatic Zoom

AMERICAN NATIONAL INSURANCE COMPANY  
NATIONAL MARKETING DIRECTOR COMPENSATION SCHEDULE

This compensation schedule shall cancel and supersede all previously effective Compensation Schedules and Paid Production requirements, but it shall not impair your rights to commissions or fees, if any, earned under the provisions of any prior schedules. Commissions and fees are expressed as a percentage of premiums paid unless otherwise noted. **Schedule consists of 4 pages total.**

Life Products	Ages	1st Year	Additional Deposits/Renewals				
		Target	Yr. 2-3	Yr. 4-5	Yr. 6-7	Yr. 8-10	Yr. 11+
Signature Performance I UL <sup>1</sup>	0-69						
	excess 70-85						
Signature Guaranteed UL <sup>1</sup>	10-69						
	excess 19-69						
	70-80						
	excess 70-80						
ANICO Executive UL <sup>1</sup>	0-69						
	excess 0-69						
	70-85						
	excess 70-85						
Signature Whole Life	0-69						
	70-79						
	80-85						
Limited Pay Whole Life	19-44						
	45-49						
	50-54						
	55-70						

## 8 My Information

Access the agency information within the **My Information** tab at the top. This is where the agency can locate who their up-line is, login ID, all producer code information, the address we have on file, and current contact information.

Overview	
Next level up-line:	ADV BROKERAGE LLC - ADV22
Login ID:	C09H00000
	<input type="button" value="GO"/> <input type="button" value="GO/AR"/> <input type="button" value="LO/AR"/> <input type="button" value="LO/RT"/> <input type="button" value="TT/SS"/>
Region Name	ADV BROKERAGE COMP
Region Code	09A5
Business Segment Code	74
Producer Code:	Contract Code: RGA
	Contract Effective Date: 10/12/2017
	Pay Frequency: D
	Direct Deposit Information: Direct Deposit information not found.
	Advance Information: Advance Information not found.
Address:	4706 BERRY ROAD WYLLANT, DE 46187
Phones:	Phone information not found.
Email:	C09H00000@OPS.COM



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