

SureLC Account Set up and Carrier Appointment



As an Annuity.com Agent you have all of the financial product and contract benefits available through ECA Marketing.

This includes the secure and efficient system developed by SuranceBay .

Making the contract system seamless for you and your client is our goal! This guide is designed to help you set-up your SuranceBay online account.

[Click To Start](#)

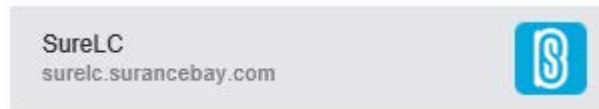


SuranceBay Online Contracting Instructions

Annuity.com, Inc. powered by ECA Marketing

LOGIN and PROFILE CREATION :

1. Go to (Click Here)



- To create a new profile, select REGISTER NEW ACCOUNT > input requested information > select CREATE YOUR ACCOUNT. Existing users (active online contracting profile through ECA Marketing), login with email and password.

Sign In
Provide the information below to verify your identity.

Email

Password

RECOVER PASSWORD LOGIN

[REGISTER NEW ACCOUNT](#)

- Review existing data and documents for accuracy in the NAVIGATION MENU. Add/update missing data and documents (highlighted in red). When all red dots and highlights have been removed, your profile is complete, and you can move forward with the carrier CONTRACTING REQUESTS and CONFIRMATIONS.

Recommendation: SuranceBay can obtain CE Transcripts and AML Training from select vendors.

To link the accounts, go to the CE & TRAINING tab > select ADD NEW ACCOUNTS > Choose CE vendor > input your username and password associated with the CE vendor account

IMPORTANT STEP: CONTRACTING REQUESTS and CONFIRMATIONS :

Get Appointed to Your Chosen Carriers:

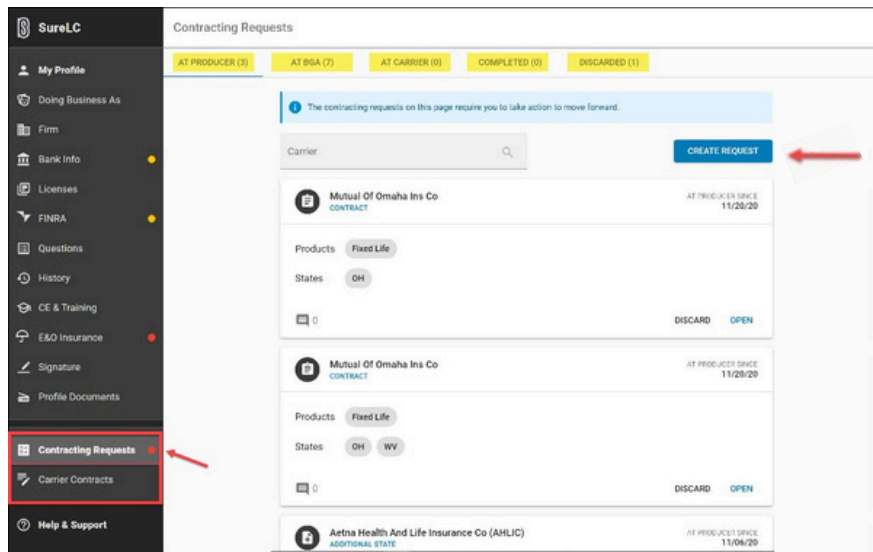
List Your Top 3 Carriers:

☐ _____ ☐ _____ ☐ _____

May We Recommend Selecting These Carriers Who Offer our Top Products:

☐ Global Atlantic ☐ Delaware Life ☐ GILICO ☐ EquiTrust ☐ F&G

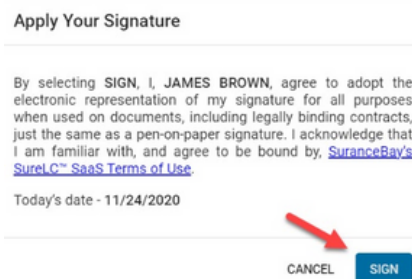
1. From the NAVIGATION MENU select CONTRACTING REQUESTS > CREATE REQUEST, select carrier name from dropdown menu > input REQUEST TYPE (contract or transfer) > choose STATES & PRODUCTS > verify information in TRAINING CONCIERGE > verify E&O POLICY > answer CARRIER QUESTIONS



2. The contract will populate, read/scroll to the bottom of the document > select APPLY MY SIGNATURE (located in the bottom right corner, selection will be highlighted in blue when ready – if blue highlight disappears, scroll up and then back down again)

APPLY MY SIGNATURE

3. APPLY YOUR SIGNATURE popup will appear > select SIGN



4. Annuity.com, Inc. and ECA Marketing will be notified of the contract request

Annuity.com, Inc.

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