ALLEGIS ADVISOR GROUP

Doing Business

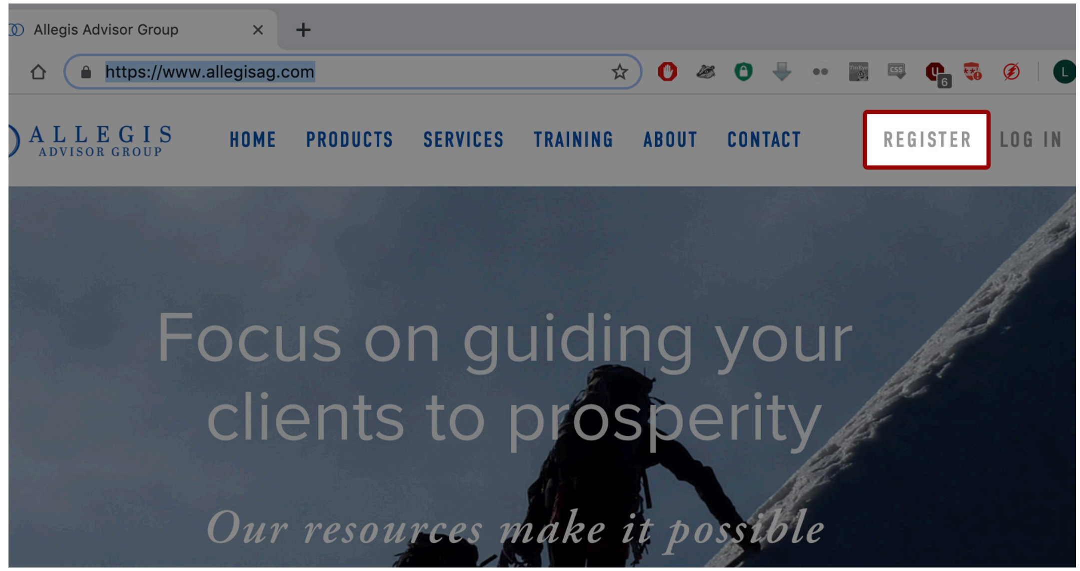
AllegisAG.com | 800-418-1788 | 10235 South Jordan Gateway, South Jordan UT 84095

AAG-190510-Doing Business-v1.08

Advisor Site Access

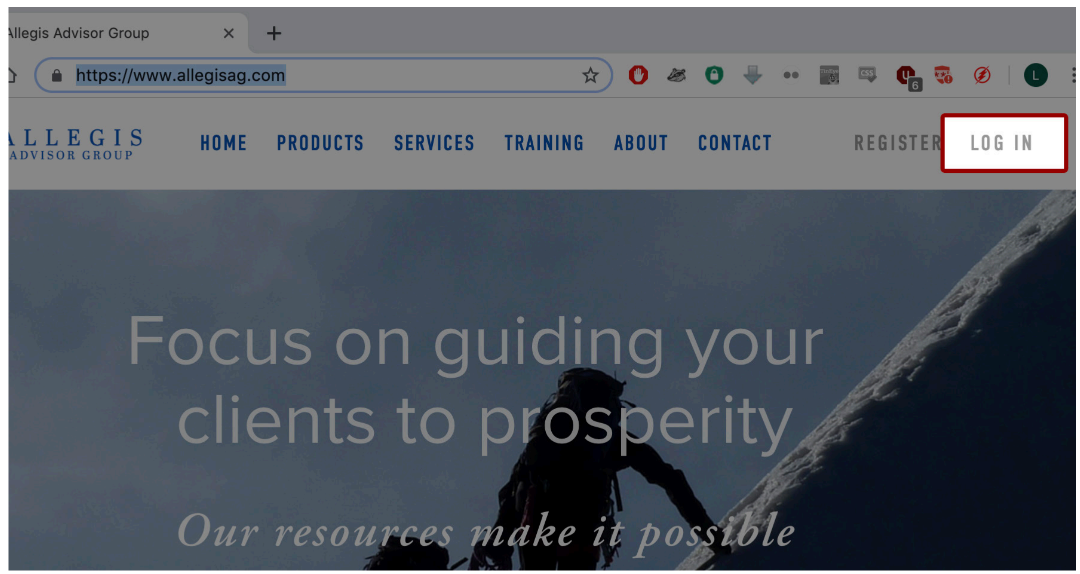
To register:

- Go to www.AllegisAG.com
- Click “Register” in top right corner
- Complete the fields and click “sign up”
- You’ll receive an approval email with login instructions (usually within a few hours, no longer than 1 business day)

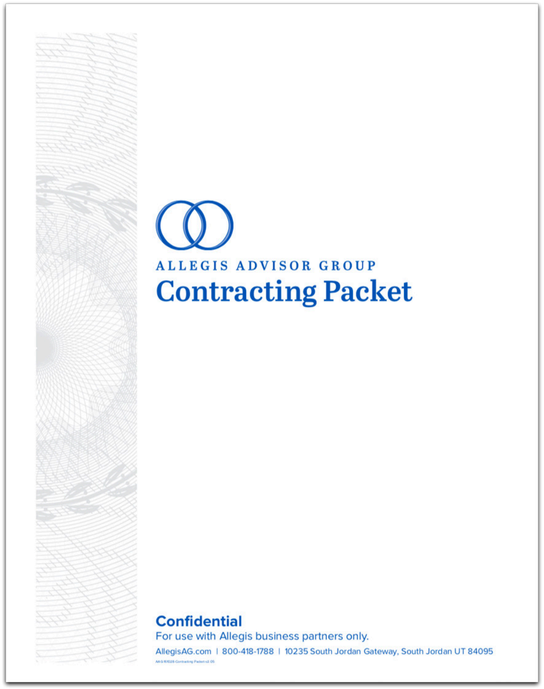


To log in:

- Go to www.AllegisAG.com
- Click “Log In” in top right corner
- Use the credentails emailed to you after registering.
- The advisor portal can also be accessed directly by pointing a browser to advisor.allegisag.com.



New Agent Contracting


ALLEGIS ADVISOR GROUP
Contracting Packet

Confidential
For use with Allegis business partners only.
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Online:

- First, register for site access (see previous page).
- Go to AllegisAG.com, log in (top right corner) and go to Agent Tools > Contracting > SuranceBay Online Contracting
- Once the SuranceBay online New Agent Contracting Packet is completed with a carrier appointment request a notification will be sent to the contracting manager.

Print:

- First, register for site access (see previous page).
- Go to AllegisAG.com, log in (top right corner) and go to Agent Tools > Contracting > Contracting Packet (PDF)
- *Submit Contracting Packet PDF to v@allegisag.com with carrier appointment request.

- Contracting Manager will pre-fill carrier specific appointment forms.
- The pre-filled carrier appointment forms will be sent via email to the agent from contracts@surancebay.com for electronic review and approval.
- Once the forms are reviewed and approved by the agent SuranceBay notifies the contracting manager that the forms are ready to be submitted to the carrier.
- Additional carrier appointment request can be sent to v@allegisag.com

PHONE

(800) 418-1788 (ext. 6)

EMAIL

v@allegisag.com

PERSONNEL

Victoria Setterberg (ext. 3904)
Contracting
Phone: (801) 826-3904
v@allegisag.com

Quotes & Case Design

Life Insurance

PHONE
800-418-1788 (ext. 2)

EMAIL
lifesalesdesk@allegisag.com

PERSONNEL

Eric Stuart (ext. 3929)
VP – Life Distribution
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eric.stuart@allegisag.com

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Matt Buttle (ext. 2611)
Business Development Consultant
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matt.buttle@allegisag.com

WEB
advisor.allegisag.com/forms/life-insurance-illustration-request
-or-
AllegisAG.com (log in), Agent Tools > Life Insurance/Underwriting > Get a Quote

Annuities

PHONE
800-418-1788 (ext. 3)

EMAIL
annuitysalesdesk@allegisag.com

PERSONNEL

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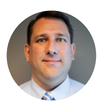

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Internal Marketing Consultant
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travis.hodgson@allegisag.com

WEB
advisor.allegisag.com/forms/annuity-quote-request
-or-
AllegisAG.com (log in), Agent Tools > Annuities > Get a Quote

Disability Insurance

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800-418-1788 (ext. 4)

EMAIL
disalesdesk@allegisag.com

PERSONNEL

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Director – Disability & LTC
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Rob Christensen (ext. 3922)
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rob.c@allegisag.com

Heather Rolfe (ext. 3977)
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WEB
advisor.allegisag.com/forms/disability-income-quote-request
-or-
AllegisAG.com (log in), Agent Tools > Disability Income > Get a Quote

Linked Benefits/LTC

PHONE

800-418-1788 (ext. 5)

EMAIL

linkedbenefits@allegisag.com

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rob.c@allegisag.com

WEB

advisor.allegisag.com/forms/long-term-care-quote-request
-or-
AllegisAG.com (log in), Agent Tools > Long Term Care > Get a Quote

Advanced Markets

We understand that advisors are busy in the day-to-day processes as the rainmakers for their practice.

The Advanced Markets Team can ease that challenge with guidance on your more technical and complex cases, including estate planning and analysis, business and succession planning, tax-saving strategies, premium finance, and many more advanced concepts.

You have a back office to enhance your offerings and provide you with an edge for competitive cases. It might be a simple call with a technical question or partnering for a design and case presentation. Our goal is to boost your business production by increasing your horizon.

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WEB

www.allegisag.com/advanced-markets

In-House Underwriting

Our Chief Underwriter has over 25 years of underwriting experience.

This resource is fundamental to helping you position the case, work with carrier underwriters, get the best offer and get your case placed.

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www.allegisag.com/underwriting

New Business

2 Types of E-apps:

1) Drop Ticket:

- Vive
- iGO® e-App
- ApplicInt
- Allegis Mobile App (via Apple App Store or Google Play)

2) Full Electronic Apps:

- iGO® e-App
- *Select Carrier Sites*
- FireLight®

Paper Apps:

- Found at AllegisAG.com (log in), Agent Tools > Case Status & Forms > Carrier Forms
- Email to newbusiness@allegisag.com, deliver to dedicated case manager, or fax to 800-313-7460

Case Status:

- AllegisAG.com (log in), Agent Tools > Case Status & Forms > Case Status
- Select “Log in to Case Status” for additional detail
- Case Updates & Requirements will come from dedicated Case Manager

Case Management & Commissions

Case Management

PHONE

800-418-1788 (ext. 1)

PERSONNEL

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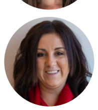

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Commissions

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PEAK Series

ALLEGIS
PEAK
SEMINAR SERIES

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EMAIL

gary.anderson@allegisag.com

PERSONNEL

Gary Anderson (ext. 2604)
VP – Marketing
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gary.anderson@allegisag.com

These programs guide you through the processes to perfect your practice by helping you become a more skilled advisor, find more clients, and close more business.

Long-Term Care Seminar: Protecting a Client's Assets with Insurance

A proven turnkey program to help advisors identify, present and close long-term care and wealth transfer opportunities to protect their clients in retirement.

Business Owners Summit: Avoiding the 6 Business Killers

The summit is an educational event that empowers owners of closely held businesses with tools and strategies to help avoid the common pitfalls that could harm or destroy their business.

Retirement Planning Seminar: Creating a Successful Retirement

This seminar is an educational event held in a university setting and provides attendees with an overview for retirement covering a variety of topics that each retiree will face.