American Amicable

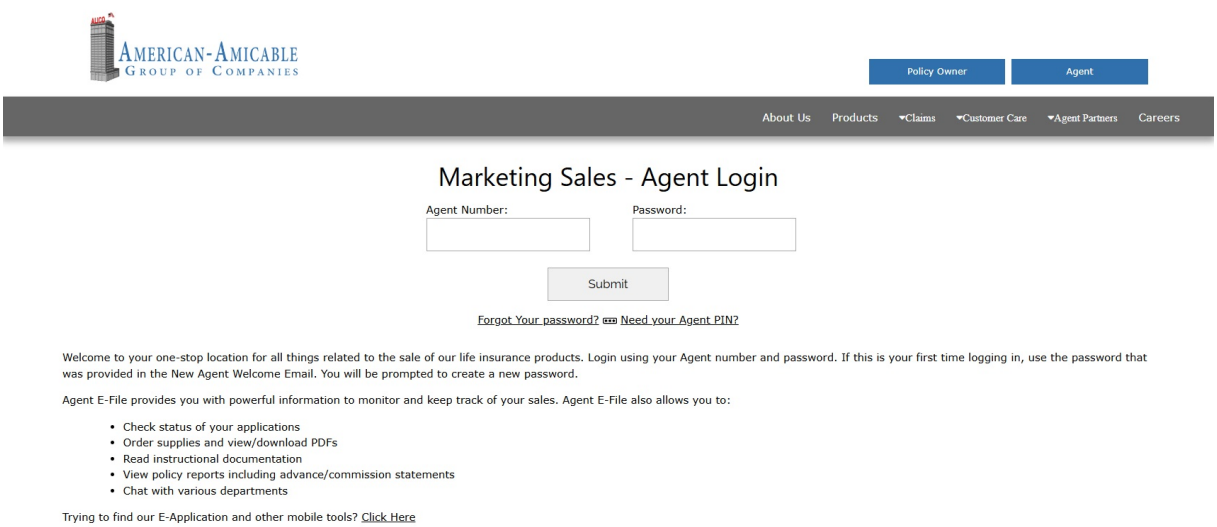
REMINDER

Benavest do not offer advanced commissions for Life contracts. COMMISSIONS ARE *AS EARNED*.

If you are already contracted with American Amicable, please refer to **Transfer Instructions for American Amicable**.

Carrier Portal

Navigate through: https://www.americanamicable.com/v3/agentLogin.php



AMERICAN AMICABLE CONTRACTING FOR NEW AGENT

Step 1.1: Life Contracting Confirmation

You will receive an email with the following information.

From: office@benavest.com
Subject: Life Contracting Confirmation

URGENT - ACTION NEEDED FROM YOU

Upon receiving the email, please reply with your confirmation to the following Life contract agreement.

- Benavest does not offer advance commission. All commission are **AS EARNED**.
- We can only process five (5) carriers at a time for timely contracting. If you have selected more than the maximum, please let us know which five carriers you want to start with
- Attached the following paperwork in your email response in case you haven't provided/submitted the following.

> - Social Security Number
> - AML Certificate (Validity: 2 years)
> - E&O Certificate (Validity: 1 year)
> - Driver's License
> - Personal Voided Check (except when you are an LOA)
>
> > - If the agent is contracting as an individual and the check is not under his/her name, the agent needs to secure a letter from the issuing Bank stating that he/she is the owner of the Bank account with a signature from the Bank.

Step 1.2: Life Carrier Contracting Requested

After we receive your confirmation. The American Amicable contract will be submitted to the carrier on your behalf. Should there be anything else we need to complete the application, you will receive an email from office@benavest.com.

Step 2: Reagan AI Access

Reagan AI account will be created for you. Please see the login details below.

Website: https://reagan.ai/Account/Login

ReaganAI Login details
Username: (your registered email)
Default Password: Insurance1*

⚠ ***We encourage you to change your default password as soon as you log-in*** ⚠

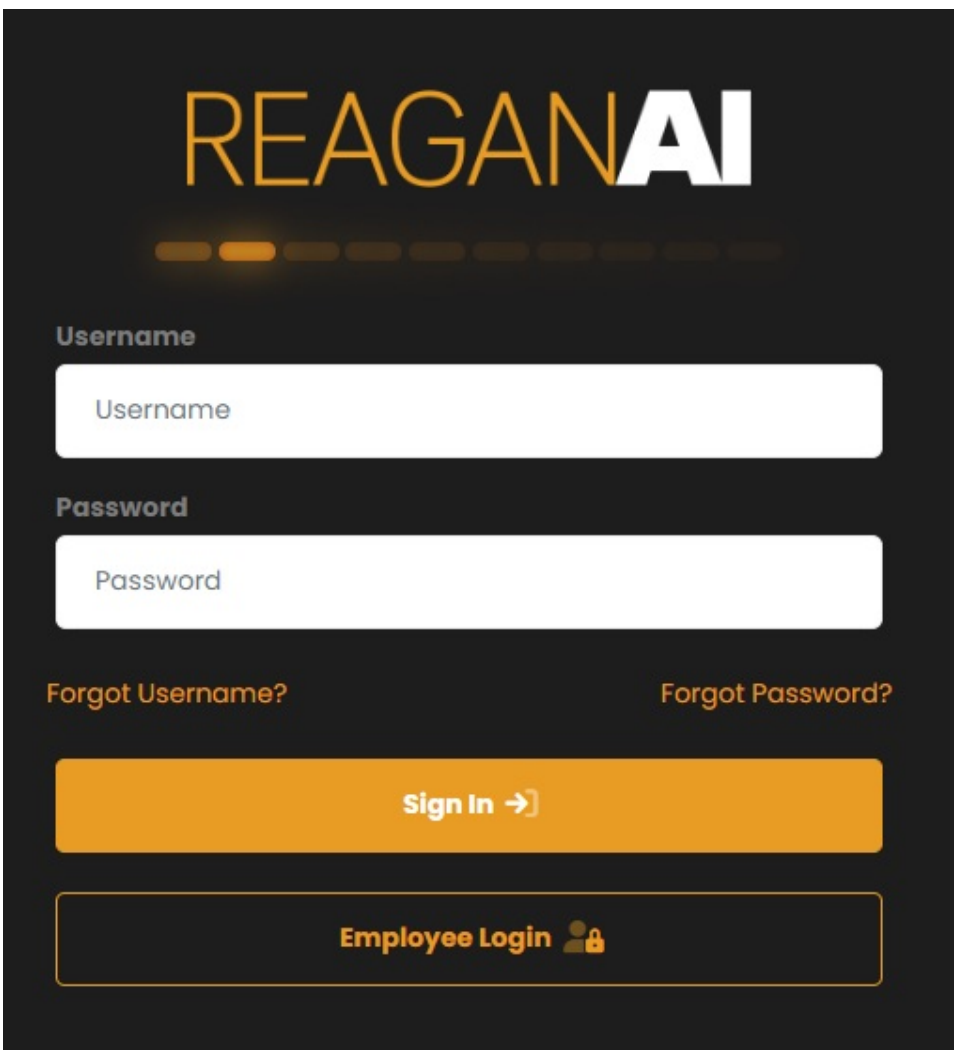
If the credentials is not working. Please send an email to office@benavest.com

What is Reagan AI?

Reagan AI is the ultimate companion for insurance agents, providing robust tools and functionalities to simplify and streamline your business operations.

Inside Reagan AI, you can also check the status of your contracting request.

Website: https://reagan.ai/Account/Login



Status Definitions

In Progress – The agent is currently working on their onboarding invite.

SuranceBay: In Progress – The agent is still completing their ReaganAI onboarding and has reached the phase of creating their SuranceBay account and completing their profile. PLEASE NOTE: If the agent believes they have completed their SuranceBay account, but is still stuck in this view in ReaganAI, they may not have added their Driver's License information. Please confirm with the agent that this has been entered into their SuranceBay profile, in the "Profile" tab, to move them forward in the process.

Ready for Review – New agents that have completed the onboarding process and have approved the contract selections per the invite, as well as existing agents that have approved the contract selections per the invite. These carriers are now ready to review by the Agent Care Team.

Contract Sent to Agent – The Agent Care Team has reviewed the agent's profile and SuranceBay account (if applicable) and has sent contracting requests to the agent for review. The agent needs to log into SuranceBay (if applicable) and approve the contracting requests.

Contract Submitted to Carrier – The contract has been submitted to the carrier.

Waiting – The Agent Care Team is pending information from either the agent or upline before they can process the contracting request. Refer to the "Notes" section in ReaganAI Onboarding.

Waiting on Upline – Waiting for the requested upline's appointment to get approved before the Agent Care Team processes the request.

Carriers Added – This is for new carrier requests that are added to an existing onboarding invite.

Carriers Ready – This is to show that the agent has approved the new request added to the existing invite and is ready for the Agent Care Team to review. The Agent Care Team will then direct the agent to review the contract in SuranceBay.

Release Needed – The agent needs to provide a release before Agent Care Team and the carrier will process the contracting request.

Vector Hit – Agent has an active Vector on record. Pending approval from the Executive Team before moving forward with the contracting request.

Declined – A contract that has been declined by the agent or the carrier has declined the agent's request.

Inactive – The contract request has been deactivated.

Reagan AI Training

Learn how to navigate to your Reagan AI profile visit: Reagan AI Training

Step 3: Welcome Letter

The turnaround time is 7 to 15 business days from application submission.

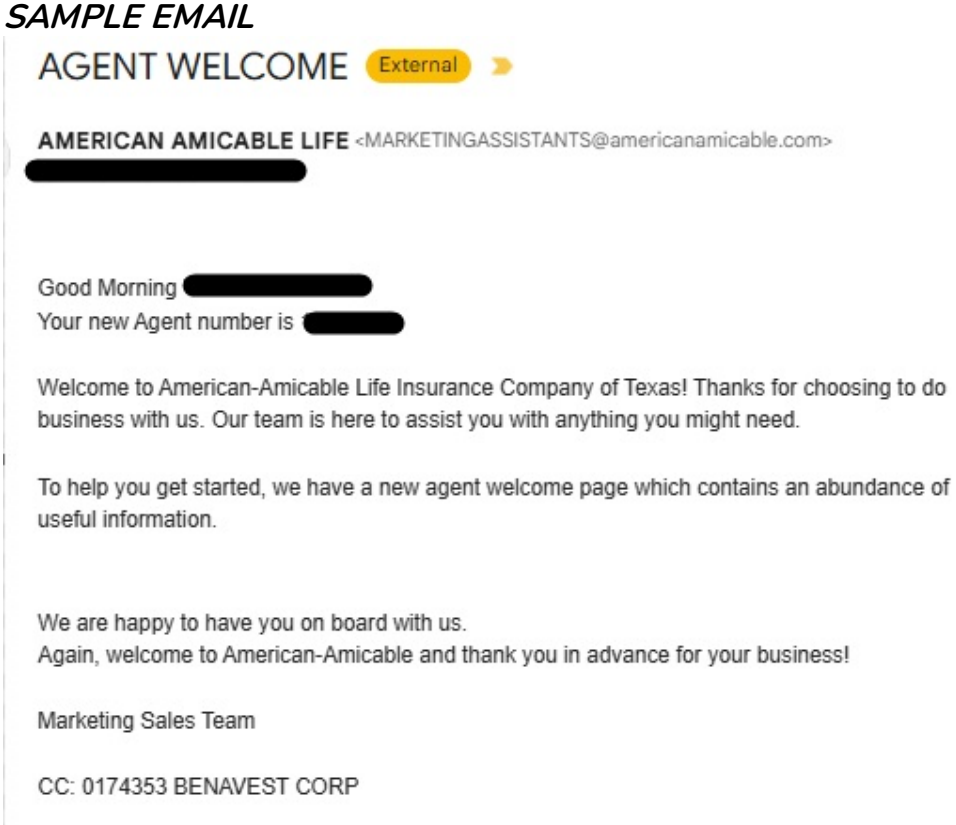
REMINDER

- **American Amicable** will be sending you welcome emails once they appoint you. Please forward these emails to office@benavest.com.
- Please be sure to register for each carrier's broker portal website once you become appointed.
- Once you're appointed, please be informed that clients or policy holders cannot maintain more than one active Final Expense plan policy at the same time.
- Please keep an eye out for the confirmation/welcome email.

You will receive the following email with your **AGENT NUMBER**.

From: MARKETINGASSISTANTS@americanamicable.com
Subject: AGENT WELCOME

SAMPLE EMAIL


AGENT WELCOME External

AMERICAN AMICABLE LIFE <MARKETINGASSISTANTS@americanamicable.com>
[redacted]

Good Morning [redacted]
Your new Agent number is [redacted]

Welcome to American-Amicable Life Insurance Company of Texas! Thanks for choosing to do business with us. Our team is here to assist you with anything you might need.

To help you get started, we have a new agent welcome page which contains an abundance of useful information.

We are happy to have you on board with us.
Again, welcome to American-Amicable and thank you in advance for your business!

Marketing Sales Team

CC: 0174353 BENAVEST CORP

Final Expense Toolkit

One of the perks of working with Benavest is having free access to the FEX tool kit. (Which is usually $30 per agent.)

You will get **FREE** access to Final Expense Quoting Toolkit after you have successfully appointed with at least three (3) Life carriers.

The FEX Tool Kit quotes all FE and non-med terms.

It also runs all risk assessments too!
You can put in any disease, medication, or health condition. The system will give you the best price!

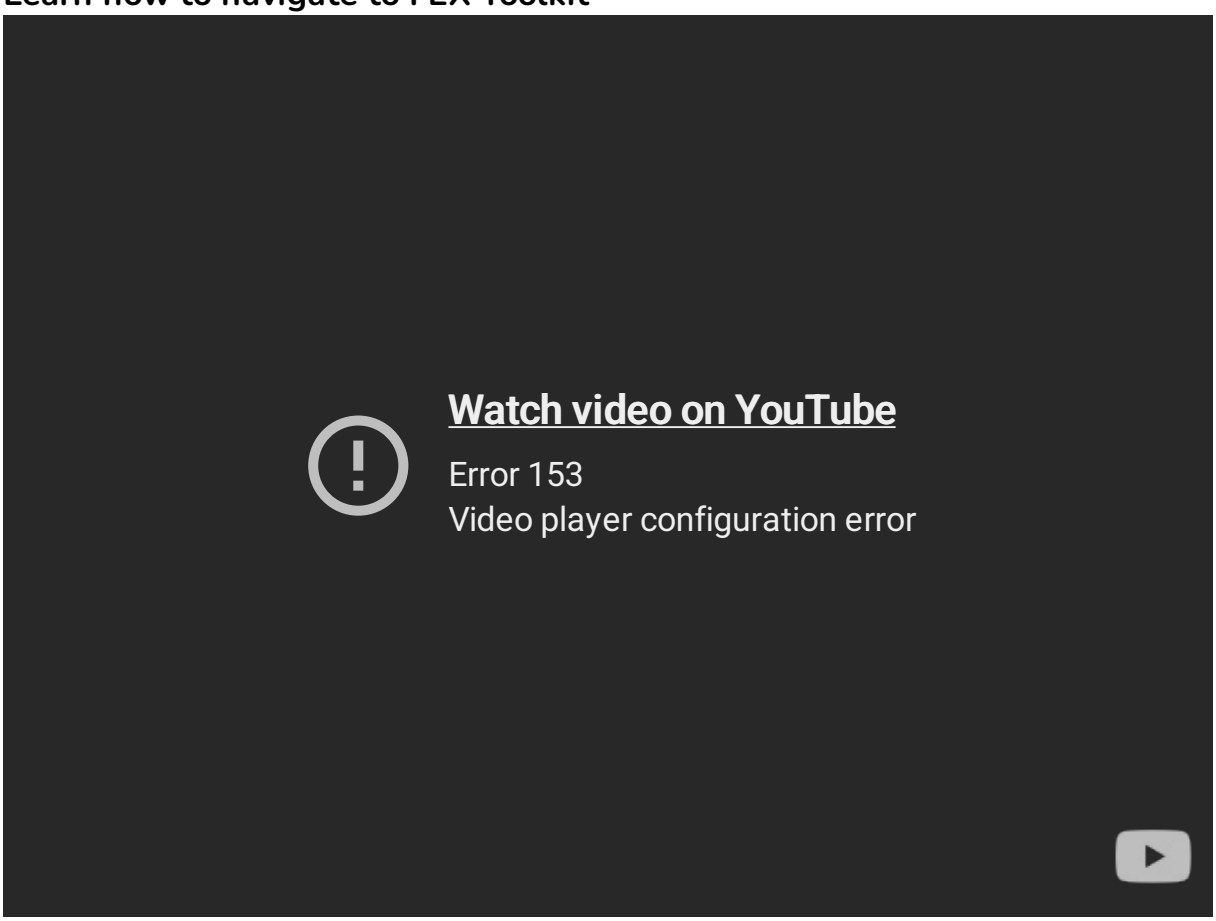
Please be sure you write at least one deal in the first 6 months.

We are looking for agents to write at least one deal a month. ***If the agent doesn't, this free quoting tool will be deactivated for not writing business.***

You will received an email with the following information once the toolkit has been activated.

From: noreply@fextoolkit.com
Subject: Insurance Toolkit Account Created

Learn how to navigate to FEX Toolkit



Transfer Instructions for American Amicable

Option 1

You must provide a release signed by you and your current IMO.

All carriers, including **American Amicable**, should be listed on the Release.

Forward the email and the release signed to the following.

Email: office@benavest.com
Subject: Release from (IMO)

Option 2

If you cannot get a release from your current IMO, you must email Benavest your intent to transfer from your current IMO to Benavest. Include American

Amicable is in the list of carriers you want to transfer.

Email: office@benavest.com
Subject: Transfer Request

I do not know who is my current IMO

You must contact American Amicable to know who your current IMO is.
Due to privacy policy, the carrier will not give us this information.

Carrier Support Contact Details

✉ contracting@aatx.com
(800)-736-7311

Benavest Contact Details

✉office@benavest.com
(800) 893-7201 x 1610
(954) 947-8694

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