

Go to [www.jetter.com](http://www.jetter.com)



Click GET APPOINTED from the menu, then click

**Log In/Register**



SureLC For Producers

Enter your email address as your username

Enter the password you created when you first registered

If you forgot your password, click the RECOVER PASSWORD link and follow the prompts to reset your password

**Sign In**  
Provide the information below to verify your identity.

Email  
producer.4063767@surancebay.com

Password

RECOVER PASSWORD LOGIN

Questions?

Please contact your agency



**SuranceBay Agency 1**

(813) 555-1212

HappyNov23@surancebay.com

[REGISTER NEW ACCOUNT](#)

Once logged in, go to the Contracting Requests Page

**Contracting Requests**

and click **Create Request**.

Contracting Requests

JB

AT PRODUCER (3)

AT BGA (4)

AT CARRIER (0)

COMPLETED (0)

DISCARDED (0)

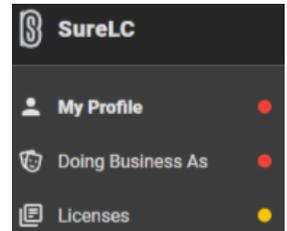
The contracting requests on this page require you to take action to move forward.

Carrier



**CREATE REQUEST**

\*\*If the Create Request button is not enabled, then there is info missing from your profile. Look for red or yellow dots on the navigation menu to the left, which indicates missing info and provide the info required



## Step 1: Carrier & Request Type

Use the carrier list to select the carrier and then select the request type. In the following example Transamerica was selected as the carrier with Contract as the request type. Select **Next** to continue.

Contracting Requests > Carrier

1 Carrier & Request Type 2 States & Products

Select Carrier & Request Type

Select Carrier

Aetna Health And Life Insurance Co (AHLIC)

Aetna Life Ins Co (ALIC)

American Amicable Life Ins Co Of Texas

American Continental Ins Co (ACI)

Americo Financial Life And Annuity Ins Co

Request type

Contract

Add State

Payment

Transfer

NEXT

## Step 2: States & Products

Next, select the product type(s) you would like to sell, and the state(s) where you would like to be appointed for the carrier. Only states where you currently hold an active license are listed. Your resident state is tagged with a house icon. Then select **Next** to continue.

Contracting Requests > States & Products

1 Carrier & Request Type

2 States & Products

3 Training

4 Errors & Omissions

5 Carrier Questions

6 Questionnaire

7 Review & Sign

Select States & Products

Select Product

Fixed Life  Fixed Annuity  Accident and Sickness  Med Supplements  Disability

Long Term Care  Variable Life  Variable Annuity

Licensed States

Ohio  Surety Bail Bond, Accident & Health, Life, Casualty, Property, Variable

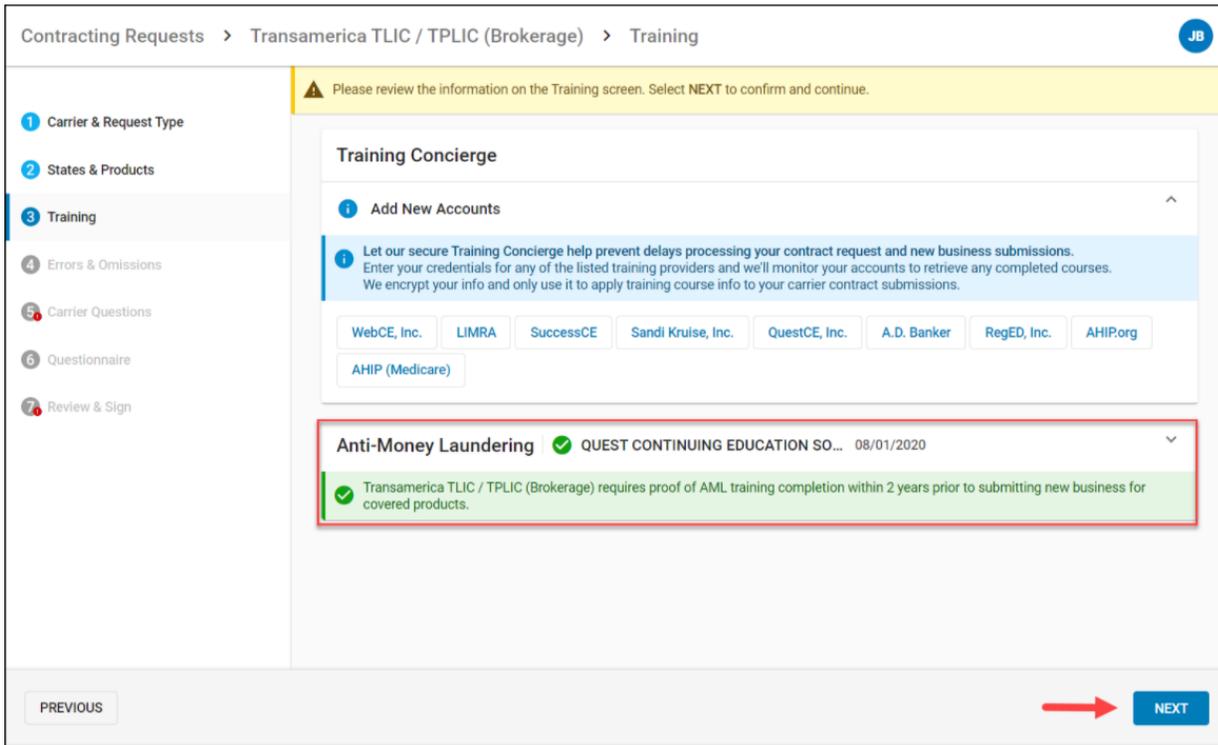
West Virginia Surety

PREVIOUS

NEXT

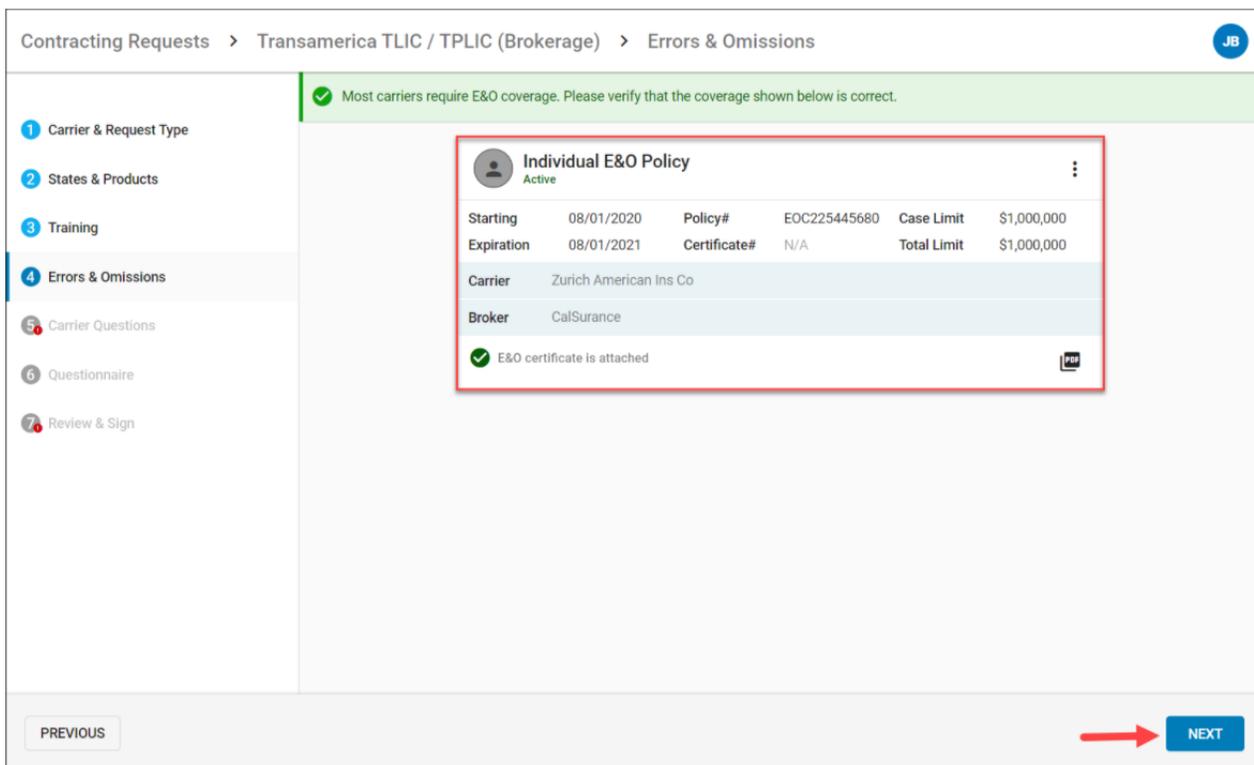
### Step 3: Training

On this step, if there are any training requirements for the carrier and product you have selected, they will be shown at the top of the page. In the example below, the producer has already uploaded their AML training information which has satisfied the requirement for the carrier. If this information is missing and is required, it will have to be fixed/added before you'll be able to proceed. Select **Next** to continue.



### Step 4: Errors & Omissions

Some carriers require producers to have Errors & Omissions insurance. In the following example, the producer already has an active E&O policy. When E&O coverage is required, but is missing, it can be added here or back on the producer profile. Review the information shown, make sure the requirements have been met, and then select **Next** to continue.



### Step 5: Carrier Questions

Review all of the carrier-specific questions and provide answers as necessary. Required questions are shown in red. Once all the required questions have been answered, select **Next** to continue.

Contracting Requests > Miscellaneous JB

**Please answer the remaining questions.**

#### Carrier Questions

- NEW BUSINESS: Do you have new business to submit?**  Yes  No
- COMPANY APPOINTMENT REQUEST (Select ALL that apply): Transamerica Casualty Insurance Company  Yes  No
- COMPANY APPOINTMENT REQUEST (Select ALL that apply): Transamerica Life Insurance Company  Yes  No
- COMPANY APPOINTMENT REQUEST (Select ALL that apply): Transamerica Financial Life Insurance Company  Yes  No
- Have you been convicted of, or pled guilty or nolo contendere (no contest) to a felony or misdemeanor involving: insurance, investments or a related business, fraud, false statements or omissions, wrongful taking of property, or bribery, forgery, counterfeiting or extortion, or breach of trust?  Yes  No
- Do you have any outstanding or unsatisfied collections, judgments and/or liens, including tax liens, totaling \$50,000 or more?  Yes  No

PREVIOUS NEXT

### Step 6: Questionnaire

This step asks additional background-related questions that are required in order to submit a contracting request for the selected carrier. These questions provide important background information to the carrier about you (the producer). After reviewing ALL questions, select **Next** to confirm that all answers are current and accurate, and to continue.

Contracting Requests > Questionnaire JB

**Please review the information on the Questionnaire screen. Select NEXT to confirm and continue.**

#### Questionnaire

- 1 Have you ever been charged or convicted of or plead guilty or no contest to any Felony, Misdemeanor, federal/state insurance and/or securities or investments regulations and statutes? Have you ever been on probation?  Yes  No
- 2 Does any insurer, insured, or other person claim any commission chargeback or other indebtedness from you as a result of any insurance transactions or business?  Yes  No
- 3 Have you ever had an insurance or securities license denied, suspended, cancelled or revoked?  Yes  No
- 4 Has any state or federal regulatory body found you to have been a cause of an investment OR insurance-related business having its authorization to do business denied, suspended, revoked, or restricted?  Yes  No
- 5 Has any regulatory body ever sanctioned, censured, penalized or otherwise disciplined you?  Yes  No

PREVIOUS NEXT

## Step 7: Confirm & Sign

On this final step, you must review the completed forms. Scroll ALL the way down to the bottom of the page to enable the **Apply My Signature** button. Select that button to continue. Information cannot be edited here. If you see that your address, phone, or other information needs to be updated, that will need to be done on My Profile.

Contracting Requests > Confirm & Sign

JB

1 Carrier & Request Type

2 States & Products

3 Training

4 Errors & Omissions

5 Carrier Questions

6 Questionnaire

7 Review & Sign

**TRANSAMERICA**

Important Information

New Business Applications

To help expedite new business applications submitted simultaneously with agent appointment paperwork, please include the following information and return with your appointment paperwork:

Agent Name \_\_\_\_\_ JAMES A BROWN, Jr. \_\_\_\_\_

Client Name \_\_\_\_\_

Date new business application was signed \_\_\_\_\_

State in which the application was signed \_\_\_\_\_

State in which the client resides \_\_\_\_\_

Type of business written \_\_\_\_\_

Pre-Appointment States

The following states require an appointment at the time of solicitation:

PREVIOUS

APPLY MY SIGNATURE

Read the signature attestation and then select **Sign** to complete and submit the contracting request

Contracting Requests > Confirm & Sign

JB

Select APPLY MY SIGNATURE to confirm and submit this request.

10/3/2018

THAT THE ABOVE NAMED HAS COMPLETED

Anti-Money Laundering: Customer Identification Programs, Red Flags, Everyday Scenarios and Enforcement Cases (FE INT)

Apply Your Signature

By selecting SIGN, I, JAMES BROWN, agree to adopt the electronic representation of my signature for all purposes when used on documents, including legally binding contracts, just the same as a pen-on-paper signature. I acknowledge that I am familiar with, and agree to be bound by, [SureBay's SureLC™ SaaS Terms of Use](#).

Today's date - 11/24/2020

CANCEL SIGN

PREVIOUS

APPLY MY SIGNATURE

Once the request is submitted you'll be taken back to the Contracting Request page and get an "All Done" confirmation. You may choose to download a copy of the signed paperwork from here.

Your contract request has been submitted to your BGA and you will be contacted with any questions and updates.

All Done

Thank you for your contracting request. It has been submitted and you will be contacted if anything further is necessary. You can save a signed copy by clicking the 'Download' button below.

NO, THANKS

DOWNLOAD