




Mortgage Protection Training Series

✅ Be Field Ready or Zoom Ready

Professionalism starts before you ever meet the client — in person or on screen. Use this quick-reference checklist to make sure you're fully prepared, organized, and confident heading into every appointment.

1. eApp & Carrier Access Setup (Non-Quoter Carriers)

- ✅ Create a desktop folder labeled **“Carrier Links – Non-Quoter”**
- ✅ Add a Word doc or shortcut file with login pages for all carriers **not available through FEX Quotes or Insurance Toolkits**
- ✅ Test each carrier login — Chrome will save your username/passwords for quick access
- ✅ Confirm your **hotspot connection is saved and working** on your laptop or tablet, so you can connect seamlessly in the field

 *Nothing says “pro” like a smooth login and instant access to your apps — even in the field.*

2. Keep Paper Apps in Your Bag (Always)




- ✅ Print and organize paper applications for your most-used carriers
- ✅ Store them in a clean folder with pen, notepad, and optional leave-behinds
- ✅ Use when Wi-Fi is unavailable or when clients prefer pen-and-paper


 *The old-school backup that still closes deals when tech fails.*






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3. Have Carrier Brochures & Field Underwriting Guides Ready

-  Order free printed brochures from each carrier
-  Keep PDF versions on your desktop to email clients immediately after Zoom or field appointments
-  Download and save Legacy's **Simplified Issue Term** and **Final Expense Field Guides**




 *Clear, carrier-branded visuals help reinforce your professionalism.*

4. Test Your Phone Hotspot Before You Hit the Field

-  Enable mobile hotspot on your phone
-  Connect your laptop or tablet ahead of time and **save the connection**
-  Turn hotspot on at each appointment to avoid depending on local Wi-Fi

 *Tech that works when you need it — no awkward delays or excuses.*

5. Quoting Tools Setup (FEX Quotes / Insurance Toolkits)

-  Register for either [FEX Quotes](#) or [Insurance Toolkits](#)
-  Bookmark the tool on your browser and test quotes for both FE and MP
-  Familiarize yourself with quoting, risk assessment, and premium ranges

 *Having accurate numbers instantly helps close without hesitation.*

Final Prep Tip:

When you're organized, you sell better. Being field or Zoom-ready isn't just about what's in your bag — it's about **how you show up**. Confidence, speed, and clarity come from being fully equipped.