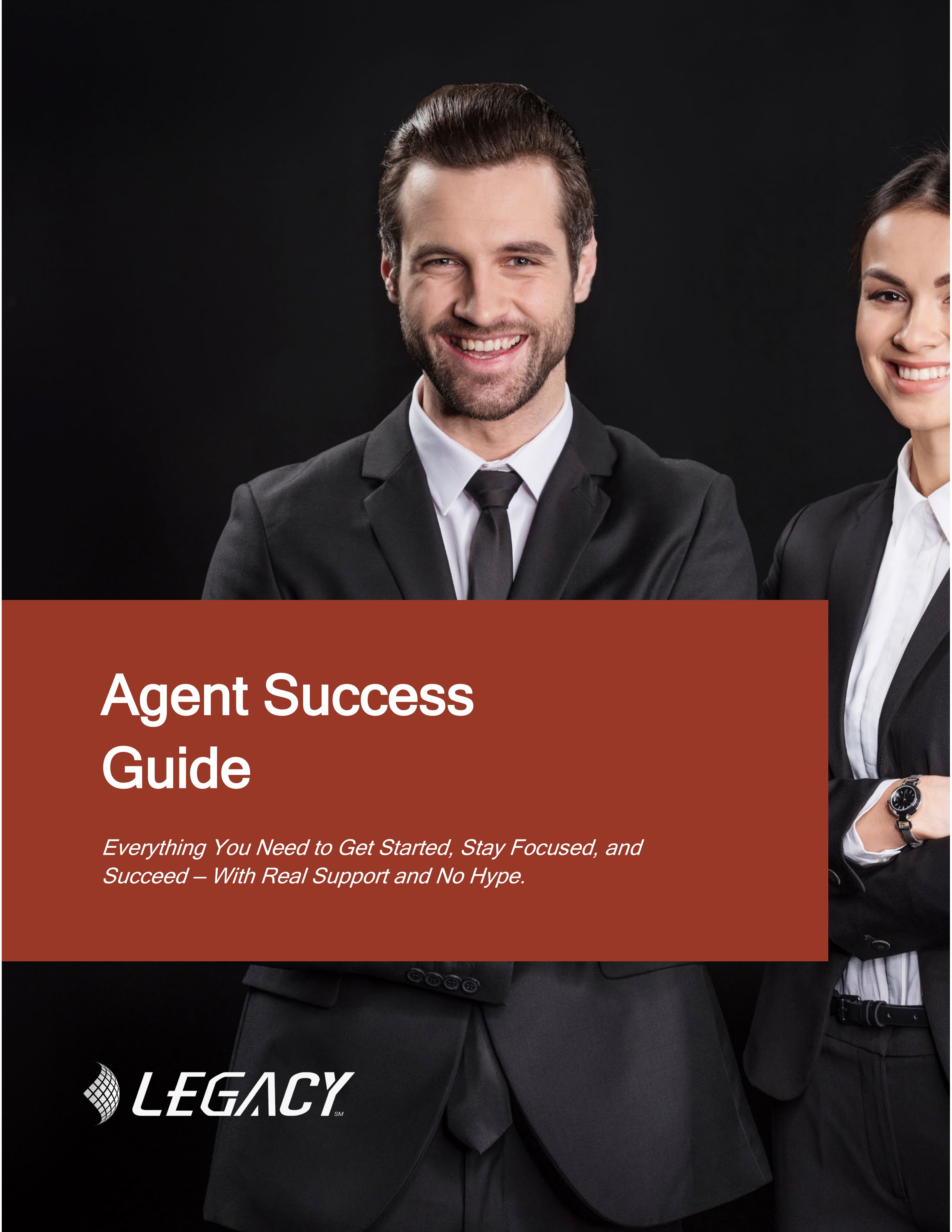

Agent Success Guide

Everything You Need to Get Started, Stay Focused, and Succeed – With Real Support and No Hype.

LEGACY℠

Welcome to Legacy Agent!

We're excited to have you on board. Whether you're brand new to life insurance sales or bringing over years of experience, this guide is your roadmap to hitting the ground running with Legacy. This isn't a hype shop or a push-to-recruit agency. We're about helping producers write business, serve families, and grow at your own pace — with real mentorship, proven tools, and no nonsense.

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1. Getting Contracted

- **SureLC Approvals:** Check your email for contracting links from SureLC. Approve them ASAP to get your appointments submitted.
- **E&O Coverage:** Required by all carriers. You can purchase it directly in SureLC if you don't already have it.
- **AML Training:** Most carriers require AML certification. If yours isn't current, you can complete it for free via LIMRA.
- **Timeframes:** Most contracts are issued within 5–10 business days. Reach out to Michael if you're waiting longer.

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2. Commissions & Getting Paid

- **How Commissions Work:** You're paid directly by the carriers unless you're on an LOA setup. Contact us if you're unsure.
- **Advance or As-Earned:** Most carriers offer 75% advances. If you're not seeing payments, check if the policy has drafted.
- **View Your Levels:** You can request your commission level for each carrier anytime. Comp sheets will also be posted in the agent portal.

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3. Your Sales Process – Simplified

Final Expense

- Script: Page 1 of the FE script packet
- Presentation: Watch the in-home training video
- App Flow: Use Legacy Quoter, then move into voice or eApp

Mortgage Protection

- Script: Found in the MP Coaching section
- Appointment: Set the appointment as a Field Underwriter
- Presentation: Quote three options, ask soft closes, and walk through the app

IUL & Annuities

- Start with the basics (coaching links provided)
- Use carrier illustrations (training in Agent Portal)
- Schedule a strategy call if unsure

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4. Tools at Your Disposal

- **Legacy Quoter:** For simplified issue (FE, MP)
- **FEX Quotes:** Advanced quoting tool — link provided
- **Training Portal:** Access recordings, scripts, and cheat sheets
- **CRM (Coming Soon):** Track leads, notes, and follow-up like a pro

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5. Training & Development

- **Video Coaching:** Available for FE, MP, IUL, and Annuities
- **Downloads:** Each section includes PDFs, scripts, and visual guides
- **Schedule:** Live sessions and Q&A posted in the Group Chat weekly
- **On-Demand:** Everything is accessible 24/7 so you can train at your pace

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6. What To Do This Week

- **Approve SureLC contracting links** – This ensures your carrier appointments begin processing right away.
- **Download the Agent Success Guide** – Keep this handy so you always have quick access to the steps, tools, and contact info you'll need as you get started.
- **Watch 1 training video (FE or MP)** – Start with the product you're most excited to sell.
- **Practice your script** – Confidence comes from preparation.

- **Run 3 sample quotes in the Legacy Quoter** – Learn how to present options clearly.
- **Contact Michael if you need help** – You're never on your own here.

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7. Support That Doesn't Disappear

You're not in this alone. If you ever feel stuck, unsure, or just need advice, reach out. We're here to help you write business — not just sign you up and disappear.

You'll also have access to our AI Assistant inside the Agent Portal — like having a mentor on call 24/7 to help you find tools, get quick answers, or walk through next steps.

"Success here comes from consistent effort and real conversations — not hype or luck."
— Michael Hrynewich

📩 **Michael Hrynewich**
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Schedule a call with Michael