

## How-To: Create an Account for the New Agent Portal

This guide will give you step-by-step instructions on how to create an account for our New Agent Portal, which now includes access to all agent tools under a single sign-on access point. You can access client policy information, commission statements, illustration software and premium calculators; as well as product forms and other plan management tools.

1. Begin by clicking on the “Create Account” button in the center of the Agent Portal webpage.



2. Enter the appropriate information for each field.

Create New Account

Enter your login, account and contact information to create new account. Then enter the image code and click the "Create Account" button.

Login Information

Login Type **A** Agent / Agency \* Required

User Name **B** \* Required

New Password **C** \* Required

Confirm Password **D** \* Required

Website Account Holder / Agent Information

Agent Number **E** \* Required

First Name **F** \* Required

Last Name **G** \* Optional

Tax ID / SSN **H** \* Required

Business ZIP **I** \* Required

Contact Information

Phone Number **J** \* Optional

Email Address **K** \* Required

Automatic Registration Protection

Enter Code From Image **L**

4 3 B B 8 2 6 F

Reload Image

Create Account

- a. **Login Type** = Agent / Agency
- b. **User Name** = Create your own.
- c. **New Password** = Create your own. Must be at least 6 characters, one upper case and one lower case
- d. **Confirm Password** = Re-enter your password
- e. **Agent Number** = This is the number you were assigned when contracted with our company
- f. **First Name** = Enter your first name
- g. **Last Name** = Enter your last name
- h. **Tax ID / SSN** = Use either your SSN or Tax ID number you used on contracting paperwork
- i. **Business ZIP** = Enter your business zip code
- j. **Phone Number** = This is optional
- k. **Email Address** = Use your business address. This can be updated later if your email address changes.
- l. **Enter the code from the image**

3. Click on Create Account.

**TIP:** If you receive an error while creating your account, you may need to contact our office for assistance. Before calling, please verify that you have entered your contact information correctly. Our system matches the information you enter with our licensing database. Any discrepancies with your Agent Number, Tax ID, or Business Zip Code may require our office staff to update your information in our database before you will be allowed to create your account.