Agent Contracting Checklist

To get contracted with your necessary carriers, please provide the following details and documentation. Once returned, you will get an email from SuranceBay to complete additional details. Some carriers may require Additional documentation to complete the contracting process.
Please submit the following information to **contracting@idesign-network.com**.

If commissions are to be paid to a Business Entity, the Owner or Principal will need to be setup in our system as well.

Documents (Required):

- ☐ Copy of your current life and health insurance license
- ☐ Anti-Money Laundering completion certificate
- ☐ Current E&O Certificate of Insurance
- ☐ Voided check (or bank letter/statement) where commissions will be paid

Documents (if applicable):

- ☐ A completed outside business activity (OBA) form. Please work with your broker-dealer to obtain.
- ☐ If you plan to do business with NIW, you will need to get your Nevada life and health license and provide a copy.
- ☐ If this requires an LTC certification, please make sure your CE is up to date.

Information (Required)

Name: ______________________ Date of Birth: ______________
Email address: ______________________ Social Sec #: ______________
Phone: ______________________
Residential Address: ______________________
Employer Address: ______________________

How will commissions be paid?
☐ Individual (*paid directly to self*) ☐ Business/Entity (*paid to your firm*) ☐ as Soliciting Agent (*paid to Employer*)

List of carriers to contract: ______________________
States to be appointed: ______________________

Information (if applicable):

Business Name: ______________________ EIN: ______________
Business Address: ______________________

For **Variable Business**, please provide CRD: ______________________
Broker/Dealer TIN: ______________________