

Welcome to the Annexus Group's

# BPA Review

To ensure that every agent that sells the balanceplus annuity receives the same detailed overview of the product, we have created a web-based multimedia presentation that highlights the important aspects of the product.

Beginning **Monday, February 20, 2006**, all agent must view this presentation prior to contracting. Please use the following instructions to direct your agents to the presentation:

## 1 Getting to the presentation

Agents can get to the presentation login screen one of two ways:

1. The internal marketer can e-mail the agent the following link:  
<http://www.annexusgroup.com/reviewlogin/>
2. Direct the agent to the Annexus Group website at <http://www.annexusgroup.com> and have them click on the "bpa review" link (see below).



## **2** Logging into the presentation

Next, the agent will be asked to log into the site to gain access to the presentation. The login requires the agent complete his/her name, phone number, e-mail address, and enter a unique password given by the internal marketer.

The password for InsurMark is: **TAGIM010**

Once the agent has entered the above information they can play the BPA Review multimedia presentation.

## **3** BPA Review Q&A Section

At the conclusion of the BPA Review, the agent will be given the opportunity to review BPA's specifications in greater detail or answer a brief Q&A section. This section contains 10 questions designed to highlight specific details about the balanceplus annuity.

Note: This is NOT a pass/fail test. If the agent gets the answer wrong, the correct answer will appear on the screen.

Once the agent has completed the Q&A section, an e-mail will automatically be generated confirming that the agent has completed the Review. Presently that e-mail will be sent to:

**czajac@insurmark.net**

At this time, this e-mail address is the same one used for your lead notifications from the Annexus Group website. If this e-mail address is NOT the one you would like to have these notifications sent, please notify Chris McDowell at [chrismcdowell@shurwest.com](mailto:chrismcdowell@shurwest.com).

The agent will then be given the opportunity to download the licensing and contracting paperwork. The paperwork will contain the your name, address, and fax number that corresponds to the TAG Code used to enter the presentation.

Once the agent completes the licensing paperwork he/she needs to fax it back to you.

## **4** Logging into the AIL website

Once you have received verification that the agent has completed the BPA Review and have received their licensing and contracting paperwork, you can process the agent's paperwork by entering the information into AIL's dashboard.

Once the information is entered into the dashboard, an agent number will be issued. Within 48 hours AIL will have processed a background check and verified if the agent is approved or if any issues have been identified that need clarification. Once the background is complete, the agent is ready to write business (in all states except those that require appointment prior to solicitation). We recommend that a confirmation letter come from your organization letting the agent know that he/she is approved to solicit business.

Once the agent writes their first contract, they will be issued a personal identification number (PIN) to be used in conjunction with their agent writing number. The writing number and PIN will be used to log into the American Investors website.

Until they are issued their PIN, the agent will be able to log in to AIL's website using the following login information:

login: **TAGIM010**  
password: **balance**

**DO NOT** give your agents this password until their licensing and contracting paperwork has been processed and an agent writing number has been issued.