








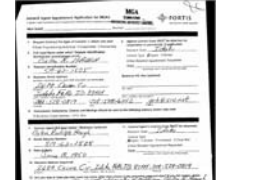
# Assurant Training for Agents with Simmons Benefits Group, Inc.

Check off all items in this guide as you implement Assurant's Health Insurance solution for a changing market. For assistance call Blair at Simmons Benefit Group, Idaho Falls, ID. Phone is 208-227-1654, or contact Galen at 208-227-1658 or Gayleen at 208-227-1653. For leads call Peter at 208-227-1659.

## 1. Getting Appointed with Assurant through SBGI's IEZ Quote System


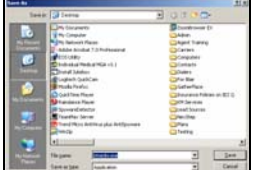
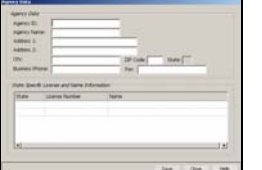
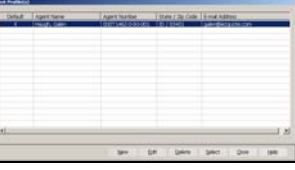




Ask your managing agent at SBGI for your user name and password to this free on-line Internet system if you don't already have it, or utilize the .

User Name: \_\_\_\_\_ Password: \_\_\_\_\_

<input type="checkbox"/> Select the Members tab for <a href="http://www.IEZQuote.com">www.IEZQuote.com</a> .	<input type="checkbox"/> Agree to the Terms of Use (bottom of page).	<input type="checkbox"/> Agent's Main Menu—click My Info to add your information.	<input type="checkbox"/> Add Public and Private Information through beneficiary (2nd pg).
			
<input type="checkbox"/> Click Application Forms and find appointment form for Assurant.	<input type="checkbox"/> Appointment Forms are data-populated! Fill in the blanks and print.	<input type="checkbox"/> Add your Insurance License and E & O contract.	<input type="checkbox"/> Fax Completed Forms to 208-227-1788.
			

## 2. Quoting with Assurant's Individual Medical Desktop Software

After logging into [www.iezquote.com/members](http://www.iezquote.com/members), click on the [Software/Mobile Office Updates](#) link under the Navigator, then right-click on "**Button 4: Time Individual Medical**" and select Save Target As to save file imsetupmga.exe to your Desktop. After downloading the file, double click to install it.





<input type="checkbox"/> Download Desktop Software from IEZ Quote (Button 4).	<input type="checkbox"/> Save IM Quoting Software to your Desktop then install.	<input type="checkbox"/> Launch program and Enter Agency Data from the Tools Menu.	<input type="checkbox"/> Enter Agent Profile from the Tools Menu.
			
<input type="checkbox"/> Enter Client Information starting with the ZIP Code.	<input type="checkbox"/> Print Manager with selectable sections.	<input type="checkbox"/> Delivery Letter by email or postal mail.	<input type="checkbox"/> Upload to Assurant's EASE procedure (more on this later).
			

### 3. Insurance Products from Assurant, starting with their new Health Access plan




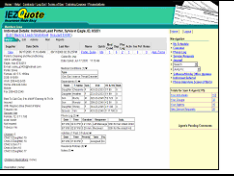




(Look for this new product coming soon to your state; in the meantime, the One Decreasing Deductible, the SaveRight, and CoreMed products are the best solutions.)

<input type="checkbox"/> Health Access— Individuals & Families.	<input type="checkbox"/> Health Access— Employers.	<input type="checkbox"/> Health Access— Employees.	<input type="checkbox"/> One Decreasing Deductible.
			
<input type="checkbox"/> SaveRight Elite.	<input type="checkbox"/> CoreMed Elite.	<input type="checkbox"/> MaxPlan Elite.	<input type="checkbox"/> RightStart Elite
			
<input type="checkbox"/> Temporary Health Insurance.	<input type="checkbox"/> HealthSaver.	<input type="checkbox"/> Patient Care.	<input type="checkbox"/> TelaDoc Medical Services.
			

### 4. Track Pending, Production, and Commissions with SBGI's IEZ Quote System

<input type="checkbox"/> Click the Members tab for <a href="http://www.IEZQuote.com">www.IEZQuote.com</a> and log in.	<input type="checkbox"/> Pending for Assurant clients is posted daily.	<input type="checkbox"/> Monthly Production Summary Reports with a few clicks	<input type="checkbox"/> Commissions are paid and posted biweekly.
			








### 5. Generate Leads, Referrals and Ancillary Sales with SBGI's IEZ Quote System

<input type="checkbox"/> Main Menu—click Orders under Contacts and Leads.	<input type="checkbox"/> Use the Phone Interview Screen for telemarketed leads.	<input type="checkbox"/> Our fast leads delivery system is free of charge.	<input type="checkbox"/> Lead Details with contact manager.
			
<input type="checkbox"/> Add your Individual Referrals, too.	<input type="checkbox"/> Clients have a Portal to IEZ Quote, too!	<input type="checkbox"/> Clients can access Online Products.	<input type="checkbox"/> And a Life Insurance Quote Engine.
			

### 6. Agent Library at AssurantHealthSales.com


After getting your Assurant number (1-2 weeks), set up an account on the [www.AssurantHealthSales.com](http://www.AssurantHealthSales.com) Web site.

Assurant #: \_\_\_\_\_ User Name: \_\_\_\_\_ Password: \_\_\_\_\_

<input type="checkbox"/> Setting up a Web account with Assurant (your agent number is required).	<input type="checkbox"/> Agent Library link then click "Start Here".	<input type="checkbox"/> Click on Quoting (Assurant's Online Quoting).	<input type="checkbox"/> NEW Quote and Submit Individual Plans for Employees.
			
<input type="checkbox"/> Take a Test Drive (link on the Sales Home page).	<input type="checkbox"/> SuiteSolutions.	<input type="checkbox"/> HSA Basics Elite.	<input type="checkbox"/> KeyMed—limited benefit hospital/surgical plan.
			

### 7. Additional Sales Support with Assurant's Web site

Assurant's Web site offers so much more:

<input type="checkbox"/> Log in with your user name and password.	<input type="checkbox"/> Find a Form: Select a State then a Category for a list of all applicable forms.	<input type="checkbox"/> <a href="#">Free Website you can personalize and distribute to all your clients!</a>	<input type="checkbox"/> My Book: Your book of business with a contact manager.
			

As soon as you've sold one Major Medical plan with SBGI and finished this training, you get a free Concorde Ballpoint Pen & Roller Ball Gift Set. Submit this form with all the check boxes marked off indicating you've been through all the training and fax this form to us with your signature:

\_\_\_\_\_ Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

After you've sold five (5) Major Medical policies with Assurant through SBGI and all the check boxes above marked off indicating you've been through all the training, you've earned a Weathertec Shoreline Jacket. The item can be found on the [www.AssurantHealthSales.com](http://www.AssurantHealthSales.com) site under the Assurant Merchandise and Active Wear option. These are available for ladies and men in a range of sizes and colors; please specify:  
 Weathertec Shoreline Jacket size: \_\_\_\_\_ and color: \_\_\_\_\_.

\_\_\_\_\_ Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

When eligible for your prizes, print your name, then sign, date, and fax this page to Simmons Benefit Group, Inc at 208-227-1788.