



New Agent Lifeline

Over the next few weeks, you will get access to a few websites and writing numbers for the carriers. It is very important to start out with an organized system. Please use this form to allow you to get answers to questions a lot faster.

Key Contacts:

EFES Main Office:

1-800-765-0711

You will call this number if you have a question for Contracting or the Lead Department.

Extensions:

Ben Boman – 252

Chase Urich – 251

Ryan Caras – 264

Lead Department – 222

AGENT HOTLINE NUMBER (ONLY CALL IF YOU ARE WITH A CLIENT)

Save this number in your phone!

866-824-6941

Email – agentsupport@theequitagroup.com



Websites:

EFES Training Site

www.efesnation.com

This is the website you will be using for onboarding and training. Make sure you create your account and go to STEP #1 to start Phase 1 of the training.

Username: _____

Password: _____

EFES Lead Center

www.efesonline.com

(You will want to click on AGENT PORTAL)

You will use this site for viewing the leaderboard, printing your leads, shopping in the shopping cart & running reports.

Username: _____

Password: _____

The EFES Store

www.theequitastore.com

You will want to go here and order Delivery Notices and Business Cards ASAP!
You will need these once you finish the training.



New Agent Checklist:

Get your lead order placed.

Start onboarding process at EFESNation.com.

Access EFES Community chat with the Band app.

Request access to Dropbox.

Start Phase 1 of EFES Training.

Login to the EFES Lead Center and look around.

Check out the Equita Store.

Order Delivery Notices and Business Cards.

Plug in to the morning calls.

Save the Agent Hotline # to your phone.



The Morning LIFELINE Call:

This call is designed to solve so many problems. It will keep you accountable, organized, plugged in & more profitable. You will call in and listen in the beginning, but as soon as you are producing, you will want to call out your numbers each day. This is the majority of agent's favorite program that we have.

This call runs daily at 8:00 Central Time. We will be adding other times to accommodate the Pacific Time Zone soon!

Number: 206-402-0100

Access Code: 149036



Company Writing Numbers:

When you receive an email with a writing number, please come write it here along with the username/password to their Agent Portal. IMMEDIATELY call the number and order supplies!

Prosperity Life

866-380-6413

Writing Number _____

Contract Level _____

Agent Portal – <https://www.insuranceadmin.com/agent>

Login _____

Password _____

Americo

800-231-0801

Writing Number _____

Contract Level _____

www.americo.com

Login _____

Password _____

American Amicable/Occidental

800-736-7311

Writing Number _____

Contract Level _____

www.americanamicable.com/marketing-login.html

Login _____

Password _____

Liberty Bankers Life (LBL)

888-525-4467

Writing Number _____

Contract Level _____

<https://www.libertybankerslife.com/mylbl/logon.php>

Login _____

Password _____

Royal Neighbors of America (RNA)

800-770-4561

Writing Number _____

Contract Level _____

<https://agent.royalneighbors.org>

Login _____

Password _____

Transamerica

877-735-5433

Writing Number _____

Contract Level _____

www.agentnetinfo.com

Login _____

Password _____



United Home Life (UHL)

800-428-3001

Writing Number _____

Contract Level _____

www.unitedhomelife.com

Login _____

Password _____

Gerber

800-428-4947

Writing Number _____

Contract Level _____

www.gerberlifeagency.com

Login _____

Password _____

Mutual of Omaha (MOO)

800-693-6083

Writing Number _____

Contract Level _____

<https://accounts.mutualofomaha.com/>

Login _____

Password _____

Baltimore

800-628-5433

Writing Number _____

Contract Level _____

<https://www.baltlife.com/>

Login _____

Password _____

American General (AIG)

800-247-8837

Writing Number _____

Contract Level _____

<https://www-115.aig.com/guaranteedlife>

Login _____

Password _____