

Quick Reference Guide

BROKER ADOPTION PROGRAM

Send multiple quotes at the click of a button!

Send your prospect an electronic quote, via email, that will allow them to view details of the plans offered. The prospect can enroll themselves and you get credit for these enrollments as the agent.

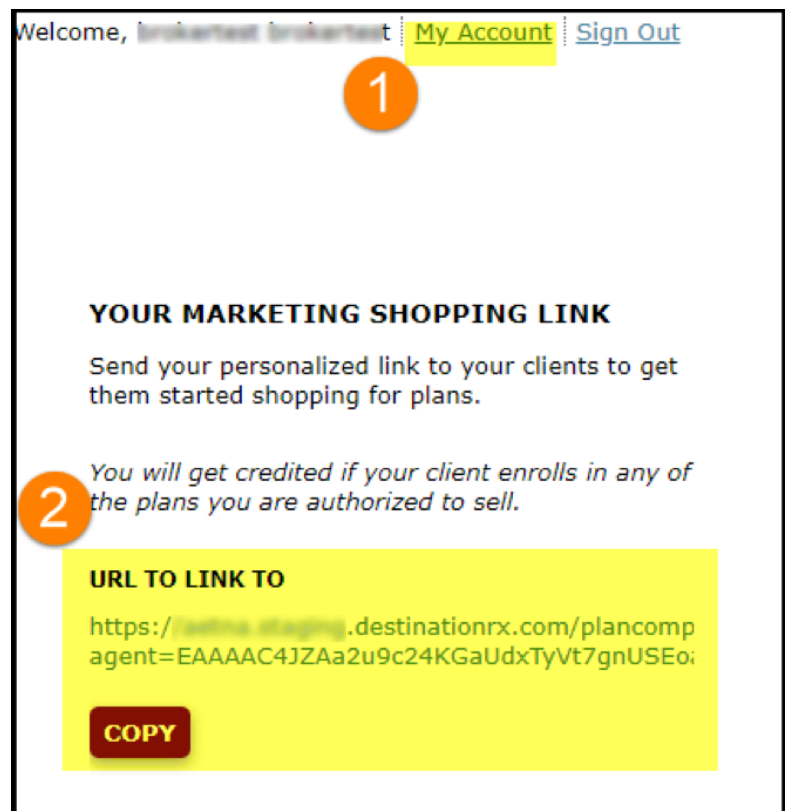


Promote your very own shopping site – pre-built with your information

See the "My Account" section to copy your personal link and send to your prospects. With one click, they can shop online, and you are credited as the agent when they enroll.

Never worry about processing

Every time you generate an enrollment in the tool, it is sent to the carrier that night.



Quick Reference Guide

BROKER ADOPTION PROGRAM

The most organized book of business

Increased organization - Never lose an enrollment because they are all in one place, just use the 'Search Profiles' option to search your book of business.

| | | | |
|---------------------------------|------------------------------------|--------------------------------------|----------------------------------|
| SEARCH PROFILES | START CONSULTATION | START NEW ENROLLMENT | SEND QUICK QUOTE |
|---------------------------------|------------------------------------|--------------------------------------|----------------------------------|

Need a paper trail? No problem!

Print a copy of completed enrollments from the tool any time.

Applicant: Margaret Geneva

| Date and Time (Pacific) | Plan | Confirmation Number | |
|-------------------------|---------------------|---------------------|----------------------|
| 8/1/2018 4:46:00 PM | Medicare Plan (PPO) | 7363N0383A | View |

Built for how you like to work

Need to stop and come back later? Pick right up where you left off when you save an enrollment in progress.

Applicant: Buffy Clark

| Date and Time (Pacific) | Plan | Confirmation Number | |
|-------------------------|-------------------------|---------------------|--|
| | Medicare Plan (HMO-POS) | | Complete saved application |

For an in-depth review of all the site features and functions, see the User's Guide.

Log in to get started today!

