



TWH Contracting Process

TWH uses SureLC. If you've used this platform recently and your information is up to date, you ONLY need to log into our portal and enter your information. Remember you will need to create a new username and password for your TWH profile, but all of your existing info will be transferred. If you're new to SureLC then we can walk you through the process.

We Believe in Creating Greater Opportunities for Your Business Together...Let's Get Started!

Checklist

1. "Tell Us About You" – Producer Information questionnaire completed
2. Review Carrier Lists
3. Answer "Last Three Questions"
4. Schedule your "Onboarding Call" to review your marketing and set up your 90-day focus plan
5. Schedule your "Meet the Team" call

** I understand that before submitting business I am required to complete carrier specific product training for Annuities and sometimes for IUL's.

Please Send All Documents to:

Email: TeamTWH@TWHagency.com

Phone: 800-200-9194 Ext. 203 or 207 | Fax: 714-462-8869 or 714-283-9195

Mailing Address: 650 E Parkridge Ave., Suite 112, Corona, CA 92879



Tell Us About You

Legal First Name: _____ Last Name: _____

D.O.B. ____/____/____ Marital Status: _____ Anniversary ____/____/____

Spouse/Partner Name: _____

Email Address: _____ NPN (National Producer Number): _____

Driver's License Number: _____ State: _____ Expiration Date: __/__/____

Do you have a Website? If Yes please provide (www.) _____

Business Phone: _____ Cell Phone: _____

Fax: _____ Business Address: _____

City: _____ State: _____ Zip: _____

Resident Address: _____ City: _____

State: _____ Zip: _____

Send all mail to: Business Address Home Address

APPOINT AS: Individual Business Entity Licensed Only/Solicitor

If LOA/Solicitor Who is Commission Assigned To: _____

Agency Name: _____ Agency Tax ID: _____

Company Type: Corporation Partnership LLC

Your Title: _____

Are you a Registered Rep with FINRA, RIA, IAR? YES NO

If Yes, Broker/Dealer Name: _____ Your CRD# _____

Please list any License's, Credentials, & Designations (i.e. series 6, 63, LUTCF, CFP, ChFC, CLU, etc.):

States to be appointed in (List Resident State First):



TWH

Financial and Insurance Solutions, Inc.
#1 Concierge FMO in America!

Please Check All That Apply

1. I have been licensed for:

- >5 years
- <10 years
- I am a solopreneur
- I am agency builder with a team
- I am part of an agency

2. I Currently write:

- Annuities
- Life Insurance
- AUM/Securities
- Employee Benefits
- Medicare Supplements
- P&C

3. I find new clients by:

- Buying Leads
- Referrals
- Generating my own leads
- Seminars
- Existing Clients
- Other



4. I have or use all of the following: (check all that apply)

- CRM
- Retirement Income Analysis
- Videos
- Website
- Digital Marketing
- LinkedIn
- Direct Mail
- Other

5. My primary market is:

- Baby boomers/Retirees
- Business Owners
- Millennials
- Other

6. What is the best way for us to communicate with you? _____

7. What do you want or need more of?

- Back Office Support
- More people to see
- A Sales Process
- Product Training
- Marketing Material



Please Answer the Following Questions TRUE or FALSE

- True or False I have enough people to see.
- True or False I have a prepared, practiced presentation that I use with all new prospective clients.
- True or False I have a written marketing plan and a clearly defined target market.
- True or False I seldom get to the end of a presentation and have my prospects or clients tell me that they need to think about it.
- True or False My business would benefit from more structure and use of systems in my back office.

I would like to add the following (check all that apply)

- A steady flow of NEW prospects
- A presentation and selling process
- A Client Management System
- Presentation material highlighting myself, my practice and the services I offer
- Improved Selling skills with rebuttals to common objections
- Seminars or Educational workshops
- A review of various case studies that would apply to my markets and enable me to discuss and present broader solutions with my prospective clients.



TWH Affiliated Carriers

Annuity Carriers

- | | |
|---------------------------------|--------------------------|
| Allianz | Legacy |
| American Equity | Lincoln Financial |
| American General – Power Select | LSW |
| American General – Standard | Midland |
| American Life | Mutual of Omaha |
| American National | Nassau |
| Americo – Direct | National Western |
| Aspida | Nationwide – Peak 10 |
| Athene | Nationwide – SPIA & MYGA |
| Atlantic Coast | North American |
| Axonic | One America |
| Delaware Life | Oceanview |
| Equitrust | Oxford Life |
| Fidelity & Guaranty | Pacific Life |
| Global Atlantic | Reliance Standard |
| Great American | Revol One |
| Guaranty Income | Sagicor |
| Guggenheim | Sentinel |
| Integrity | Silac |
| Investors Heritage | Symetra |
| | The Standard |
| | Upstream |

Life Carriers

- | | |
|---------------------|------------------------|
| Allianz | One America |
| American General | Oxford |
| Americo | Prudential |
| Assurity | Pacific Life (Promise) |
| Ameritas | |
| Banner | |
| Cincinnati | |
| Columbus | |
| Fidelity & Guaranty | |
| Foresters | |
| Gerber | |
| John Hancock | |
| Lafayette | |
| Lincoln Financial | |
| LSW/National Life | |
| Mass Mutual | |
| Midland | |
| Minnesota | |
| Mutual of Omaha | |
| Nationwide | |
| North American | |

****If a carrier you need is missing from these lists let us know and we will get the carrier contract for you!**



Last Three Questions!!

1. Are you looking for a primary relationship with TWH or adding us to other FMO relationships?

2. Tell us which carriers you have placed business with in the past 6 months.

3. Tell us which carrier contracts are movable and which you would need a release for.

A Member of our team will contact you about next steps and to develop your 90-Day Focus Plan.