

RVP:

Fact Finder- MGA, Agency, or Agent Profile

		s of MGA/Agency/A	yont.	Fax #	L										
				Phone											
-															
3.															
	If corporation: Date of incorporation: State of incorporation: Corporate Name: DBA:														
	List all owners, %	of ownership & ser	nior officers. If partnersh	hip, list all partners:	:										
	Have any of the F	Principals been cont	racted with National Life	e or LSW?	s 🗌 No										
4.	Size of Organizati	ion : # of Agents to	day :# of new Age	ents planned this ye	ar <u>:</u>										
5.			uity marketing support staff:												
6.		ear's Paid Annualiz													
Nam	ne of Carrier	UL	Whole Life	VUL	Term	Annuiti									
		\$	\$	\$	\$	\$									
		\$	\$	\$	\$	\$									
		\$	\$	\$	\$	\$									
		\$	\$	\$	\$	\$									
7.	Approximately how much of this production came from your own personal production? :														
8.	Approximately ho	ately how much of this production came from your sub-producers? :													
9.	What is the profil														
10	What is the profile of your typical sub-producer? : . Target Markets / Marketing Strategies:														
		ic area(s) do you m	arket/recruit?												
11.	. In what geograph														
11.	. In what geograph				. What are your production goals with National Life Group over the next three years?										
		oduction goals with	National Life Group over	r the next three yea	rs?										
	. What are your pro	\$\$	life premium	-	annuity prem										
	. What are your pro Year Year	\$\$	life premium	\$\$	annuity prem annuity prem	ium									
	. What are your pro Year Year	\$\$	life premium	\$	annuity prem annuity prem	ium									
12.	. What are your pro Year Year Year	\$\$ \$\$	life premium	\$\$ \$\$	annuity prem annuity prem	ium									
12.	. What are your pro Year Year Year	\$\$ \$\$	Iife premium Iife premium Iife premium	\$\$ \$\$	annuity prem annuity prem	ium									
12.	. What are your pro Year Year Year	\$\$ \$\$	Iife premium Iife premium Iife premium	\$\$ \$\$	annuity prem annuity prem	ium									
12. 13.	. What are your pro Year Year Year . If affiliated with	\$\$ \$ a broker dealer, ple	Iife premium Iife premium Iife premium	\$\$ame and address.	annuity prem annuity prem annuity prem	ium									



MGA/ Agency Name: _____

	RVP:										
	Fact Finder- Part II										
1.	Who are the Key Contacts at this group? Pl Name <u>Title/Role</u>			lease include pr	incipals, head of <u>Phone #</u>	operations, etc	ations, etc. <u>Email</u>				
2.	Please identify the Target Markets of this group. a) Type of products: Life Annuities % Flow vs. SPDA b) Type of clients: Affluent Middle America Mortgage Senior wealth Transfer Small Business Owner Other										
	Please explain any special considerations for this group: a) Will there be a Marketing Agreement?: Yes No b) Does this group require more than 10 levels of hierarchy? Yes No c) Communication requirements: Only through MGA Agent with cc: to MGA d) Contracted Agents will be: Direct Pay (Preferred Method) Licensed Only Agent Please provide production goals and business mix information per time frame (not cumulative).										
	a)	30 Days	60 Days	90 Days	2 nd Qtr	3 rd Qtr	4 th Qtr				
# N	lew Agents		y								
#	Life Apps.										
	fe Target mium Paid										
#	[£] Annuity Apps.										
	Annuity mium Paid										
	c) Primary	business of age		recruiting: 🗌	<u>%</u> 1-3 yrs : Life 🗌 Annuiti		an 3 yrs : <u>%</u>				
	e) Does gro	oup do informal	/trial business?	🗌 No 🗌 Yes	- % that becom						
	Regional V	ice President/Key A	ccount Signature			Date					

Vice President, Distribution Leader Signature



Gear Up to Get Contracted!

Getting Appointed has never been easier using our online partner nomoreforms!

Before you begin, you will want your bank account information for direct deposit and CRD# if securities licensed.

Step 1.*

Click on this link: https://www.ainsight. com/nomoreforms/logon?type=client_ nonins&clientCode=NATLI

Step 2.

Login using your name exactly how it appears on your state license. (If you have used **nomoreforms** previously, you will need to log on as a Returning User). Enter your personal name and social security information, not a company name or TIN.

- Enter your social security number (without dashes or spaces).
- Create a password (3-12 characters), then confirm your password.
- Enter your Client Package Code in CAPITAL LETTERS. Your Client Package Code is:

This code is confidential and is to be used exclusively for your application. It should not be shared.

• Click on "Logon To nomoreforms" button.

Step 3.

The application form requests the name of your Recruiter. Please complete that field with the following name:

Step 4.

Once all the forms are completed, click on the "Submit Forms" button. You must click on submit to process your application. You will receive a confirmation number. If you do not receive this number, your application has not been submitted.

Next Steps:

Watch your email for a confirmation from us that will contain important information regarding the contracting process.

If you have any questions please contact your recruiter.

For technical assistance, please call nomoreforms direct at 1-800-686-8279 (8:00 a.m. — 7:00 p.m. EST)

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* Note: nomoreforms requires that you have Adobe Acrobat Reader installed on your computer. If you don't already have Adobe Acrobat Reader, you can download a free copy at the nomoreforms site.

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