



MGA/ Agency Name: _____

RVP: _____

Fact Finder- Part II

1. Who are the Key Contacts at this group? Please include principals, head of operations, etc.

<u>Name</u>	<u>Title/Role</u>	<u>Phone #</u>	<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 _____
- c) **Multicultural Market:** N/A Asian Hispanic Other _____

3. 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

4. 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
# New Agents						
# Life Apps.						
Life Target Premium Paid						
# Annuity Apps.						
Annuity Premium Paid						

- b) Experience level of agents to be appointed: New: _____ % 1-3 yrs : _____ % More than 3 yrs : _____ %
- c) Primary business of agents targeted for recruiting: Life Annuities
- d) Average face amount/life premium: _____
- e) Does group do informal/trial business? No Yes - % that becomes formal? : _____ %
- f) Anticipated date of first application: _____

Regional Vice President/Key Account Signature

Date

Vice President, Distribution Leader Signature

Date



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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