

CONTRACTING CHECKLIST



At EquiTrust, our goal is to process your application as quickly and efficiently as possible. Please use this checklist to ensure we receive all the necessary items to complete your contracting request.

New agents must complete at least one of the EquiTrust Product Training modules available on Agents.EquiTrust.com to be activated as an EquiTrust agent.

Have questions? Call us at 866-598-3694. Forms can be faxed to 515-226-5102.

LICENSED ONLY (LO) WRITING AGENT	
	Agent Appointment Application (ET-3200)
	Agent License Agreement (ET-3100LO)
	Copy of Anti-Money Laundering training certificate
	Copy of current E&O Coverage (<i>required</i>)
	Copy of licenses <ul style="list-style-type: none">• Resident (<i>required</i>)• Non-resident (<i>if applicable</i>)
	Transmittal Form (ET-3102) (<i>Completed by the upline</i>)

WRITING AGENT	
	Agent Appointment Application (ET-3200)
	Agent Contract (ET-3100)
	Direct Deposit of Commission Earnings (ET-3101) (<i>required</i>)
	Copy of Anti-Money Laundering training certificate
	Copy of current E&O Coverage (<i>required</i>)
	Copy of licenses <ul style="list-style-type: none">• Resident (<i>required</i>)• Non-resident (<i>if applicable</i>)
	Transmittal Form (ET-3102) (<i>Completed by the upline</i>)

AGENCY AND SIGNING AUTHORITY	
	Agent Appointment Application (ET-3200)
	Contract <ul style="list-style-type: none">• For Agency — Agency Contract (ET-3100)• For Signing Authority — Agent License Agreement (ET-3100LO)
	Direct Deposit of Commission Earnings (ET-3101) (<i>required</i>)
	Declaration page of current E&O Coverage <ul style="list-style-type: none">• For Agency and/or Signing Authority (<i>required</i>)
	Entity Certification and Indemnification Agreement (ET-AGT-ENTITY-3503) (<i>including copy of required legal documentation listed on page 2, section 3, which verifies signing authority of principal agent</i>) <ul style="list-style-type: none">• For Agency
	Copy of Anti-Money Laundering training certificate
	Copy of licenses for Agency <ul style="list-style-type: none">• Resident (<i>required</i>)• Non-resident (<i>if applicable</i>)
	Copy of licenses for Signing Authority <ul style="list-style-type: none">• Resident (<i>required</i>)• Non-resident (<i>if applicable</i>)
	Transmittal Form (ET-3102) (<i>Completed by the upline</i>) <ul style="list-style-type: none">• Transmittal for Agency• Transmittal for Signing Authority

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