

CONTRACTING CHECKLIST

EquiTrust™

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EquiTrust is committed to processing your application in an efficient and timely manner. Please assist by using this checklist, which will ensure that we receive all of the items necessary to process your contracting request.

New agents must complete at least one of the EquiTrust Product Training modules available on the Agent Website to activate as an EquiTrust agent.

Contracting for both lines of business (annuity and life) requires two complete sets of paperwork.

If you have any questions, please call 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 Current E&O Coverage (*required*)
- Copy of Licenses:
 - Resident (*required*)
 - Non-resident (*if applicable*)
- Debit Check Authorization Form (ET-DEBITCHECK)
- Transmittal Form (ET-3102) – *Completed by the upline*

WRITING AGENT

- Agent Appointment Application (ET-3200)
- Agent Contract (ET-3100)
- Direct Deposit of Commission Earnings (ET-3101) (*required*)
- Copy of Current E&O Coverage (*required*)
- Copy of Licenses:
 - Resident (*required*)
 - Non-resident (*if applicable*)
- Debit Check Authorization Form (ET-DEBITCHECK)
- Transmittal Form (ET-3102) – *Completed by the upline*

AGENCY AND SIGNING AUTHORITY

- Agent Appointment Application (ET-3200)
- Contract
 - For Agency – Agency Contract (ET-3100)
 - For Signing Authority – Agent License Agreement (ET-3100LO)
- Direct Deposit of Commission Earnings (ET-3101) (*required*)
- Proof of Current E&O Coverage
 - For Agency and/or Signing Authority (*required*)
- Entity Certification and Indemnification Agreement (ET-AGT-ENTITY-3503) including copy of required legal documentation listed on page 2, section 3, which verifies signing authority of principal agent
 - For Agency
- Copy of Licenses for Agency:
 - Resident (*required*)
 - Non-resident (*if applicable*)
- Copy of Licenses for Signing Authority
 - Resident (*required*)
 - Non-resident (*if applicable*)
- Debit Check Authorization Form (ET-DEBITCHECK)
- Transmittal Form (ET-3102) – *Completed by the upline*
 - Transmittal for Agency
 - Transmittal for Signing Authority