Delegate Account User Guide

EquiTrust Agent Gateway Website

If you are an EquiTrust producer with a support team, you may authorize a unique, secured website account for each team member. A Delegate Account provides secured access to business-data categories of your choosing – established, modified and revoked at your discretion.

You control who receives Delegate Account authorization, and the scope of data each may access. If a password needs reset, you may initiate the reset. If a member of your support team leaves, you control the deletion of an account.

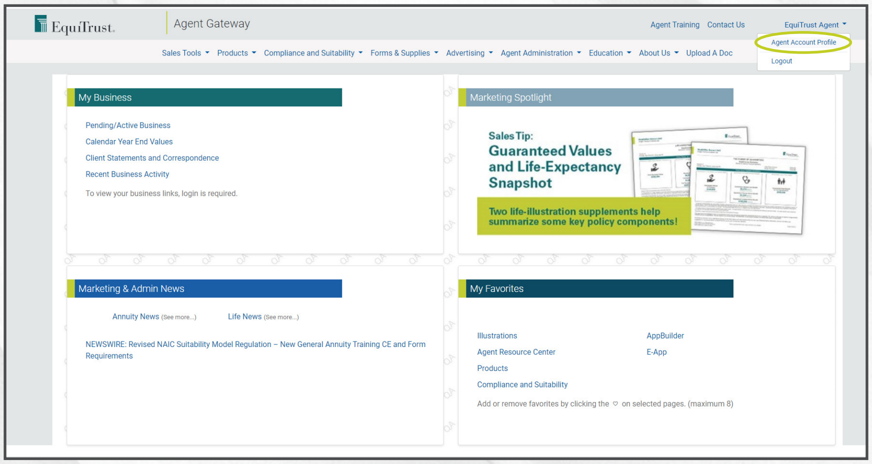
Delegate Accounts are the worry-free way to manage “who views what” with respect to your business and your client’s confidential information. The process is simple, secure and prudent.

Delegate Accounts are also the wave of the future, as certain website enhancements will require a unique login to perform certain functions.

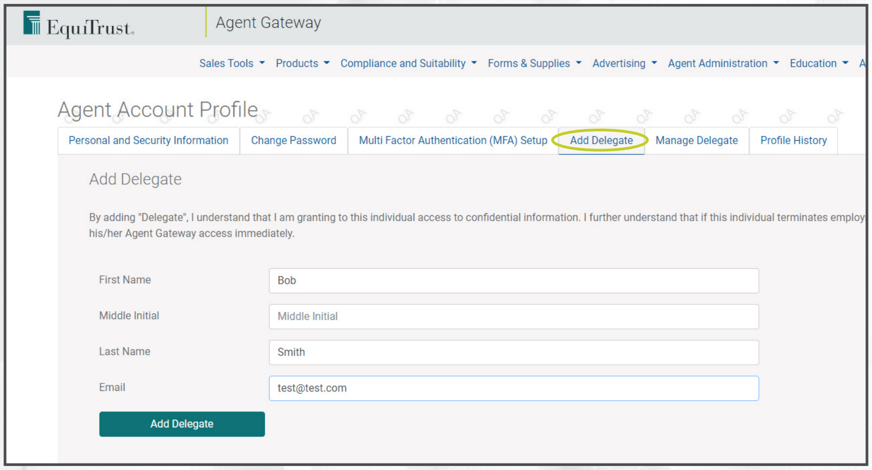
For Agents:

Getting Started — Adding Your Delegates

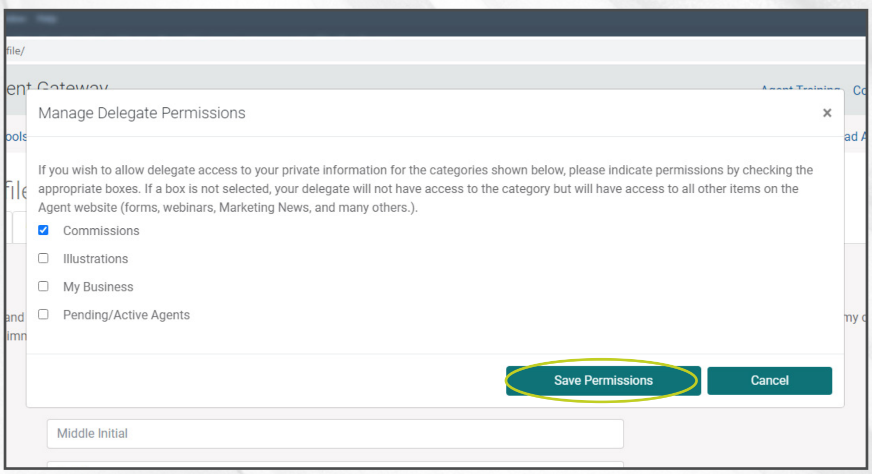
- Upon registration and login to your Agent Gateway Website account, you submit a request to add a Delegate Account, including data-access permissions.
- After login, click on your display name in the upper right corner to open your Agent Account Profile.



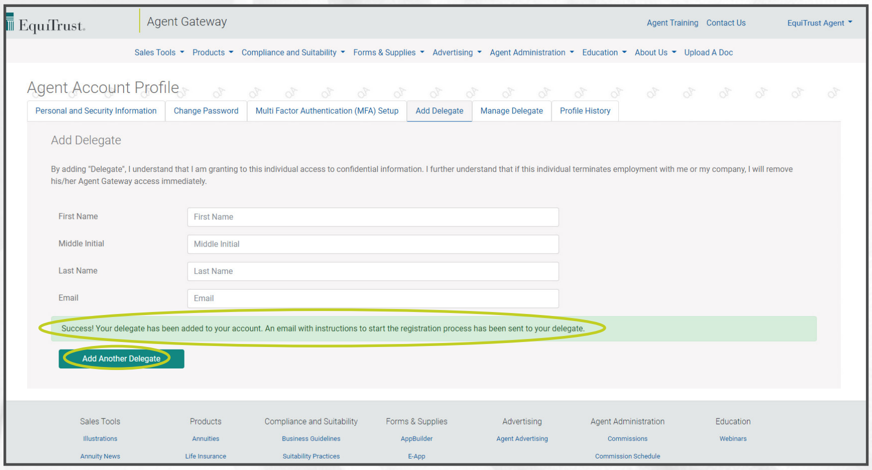
• Click on the Add Delegate tab.



• Enter delegate's name (first, middle initial, last) and email address; click Add Delegate.
• Designate the Permissions for delegate access (Commissions, Illustrations, My Business, Pending/Active Agents).
• When finished, click on Save Permissions.

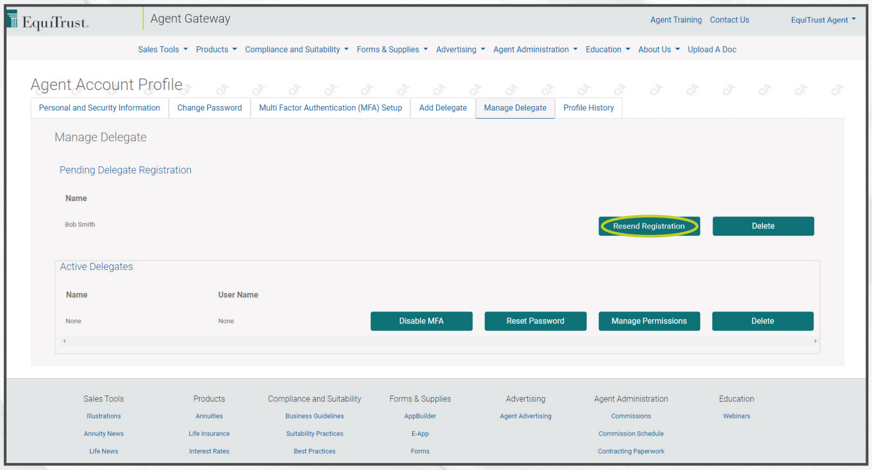


• An on-screen message should appear: Success! Your delegate has been added to your account. An email with instructions to start the registration process has been sent to your delegate.
• The resulting email to the delegate may take a few minutes to deliver.
• Below the Success message is a button to Add Another Delegate.



Resending Secure Link to Establish Delegate Account

• The secured link sent to the delegate by email expires if not used within 72 hours.
• You may resend the secured link.
• Go to Manage Delegates under your Account profile and click on "Resend registration" for the appropriate delegate. (Resend Registration link appears 72 hours after the delegate email is sent.)
• The delegate email will be resent automatically.

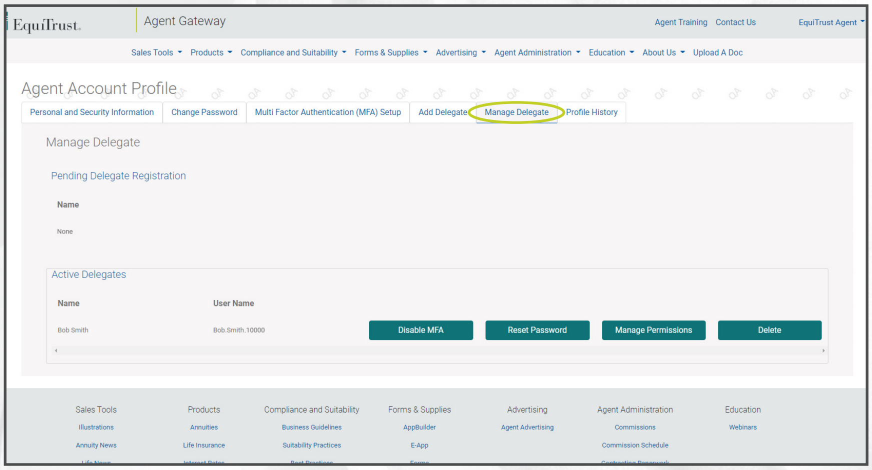


Confimation Email When Delegate Account is Established

• A confirmation email will be sent to both the authorizing agent and registering delegate upon successful registration of a Delegate Account.

Managing Delegate Accounts

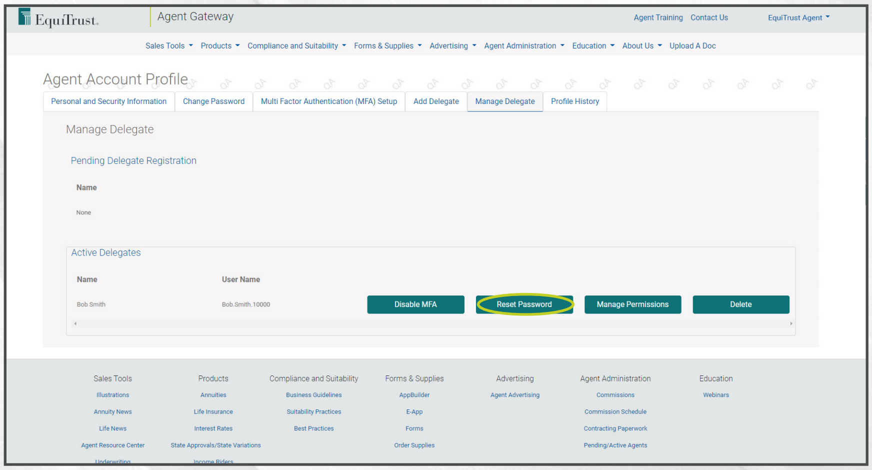
- Once a Delegate Account is created under your authority, a new tab will appear within your personal Profile (click your display name in upper right corner): Manage Delegate.



- By clicking this link, you can perform several tasks:
    - Disable Multi-Factor Authentication.
    - Authorize a password reset for your delegate.
    - Change the Permissions on data to which your delegate can access.
    - Delete a Delegate Account

Resetting a Delegate Account Password

- If the delegate's password is either forgotten or expires, a password reset authorization may be initiated in one of three ways:
    - By the authorizing agent, in the Manage Delegate field; for the appropriate delegate, click Reset Password.
    - At the Delegate Account Login page, delegate selects: Forgot Password.
    - Call EquiTrust Sales Support – at 866-598-3694.

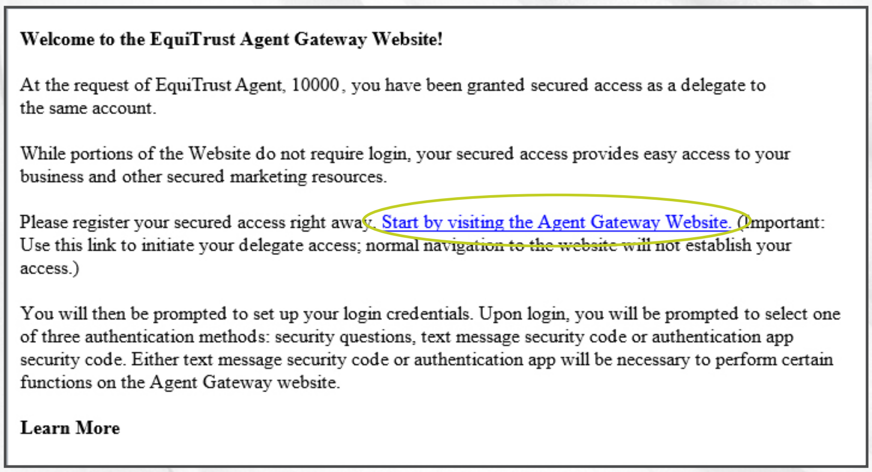


- Delegate password reset requests (from all sources) will generate an email to the delegate containing a secure link authorizing the reset.
- The emailed link must be used to reset the Delegate Account password; resetting a Delegate Account password through standard website access is not possible.
- Upon successful password reset, an email confirmation will be sent to both the authorizing agent and the delegate.

For Delegates:

Registration Email Received by Delegate at Agent's Request

- The Delegate Account request will generate a Welcome email message to the delegate – sent to the email address provided by the requesting agent.
- Included in this email is a secure link to the website Registration page, which provides the delegate authorization to register a Delegate Account under the agent's authority.
- The emailed link must be used to register the Delegate Account; registering a Delegate Account through standard website access is not possible.



Welcome to the EquiTrust Agent Gateway Website!

At the request of EquiTrust Agent, 10000, you have been granted secured access as a delegate to the same account.

While portions of the Website do not require login, your secured access provides easy access to your business and other secured marketing resources.

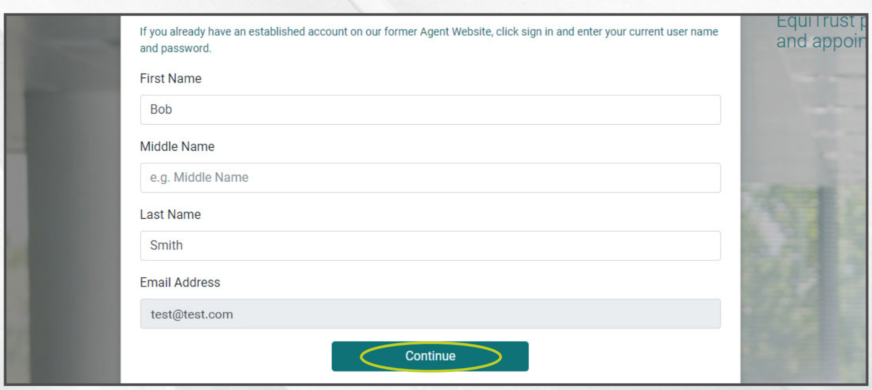
Please register your secured access right away. Start by visiting the Agent Gateway Website. (Important: Use this link to initiate your delegate access; normal navigation to the website will not establish your access.)

You will then be prompted to set up your login credentials. Upon login, you will be prompted to select one of three authentication methods: security questions, text message security code or authentication app security code. Either text message security code or authentication app will be necessary to perform certain functions on the Agent Gateway website.

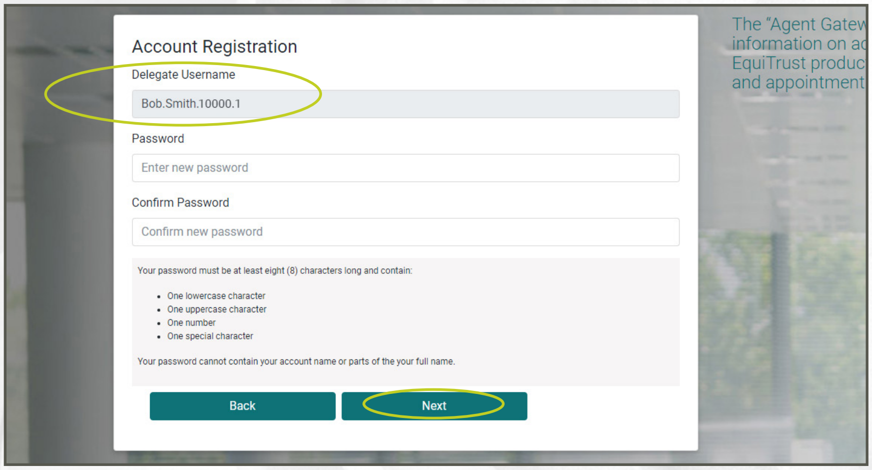
Learn More

Delegate Registration

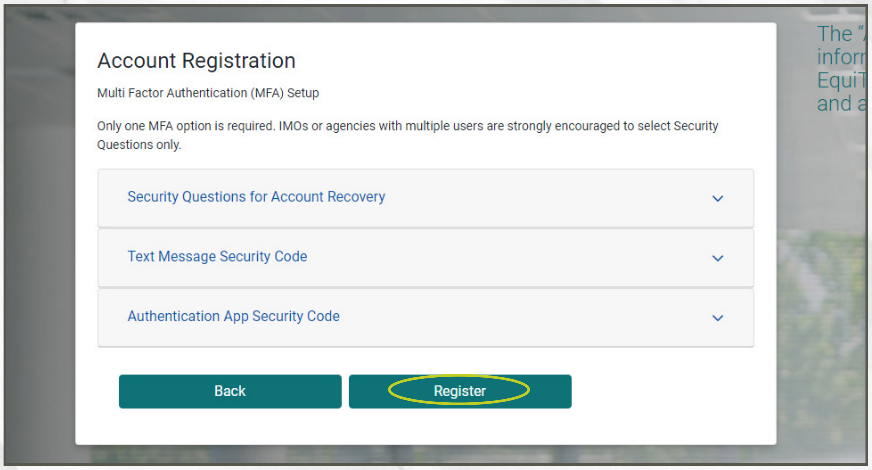
- The emailed link will open the Agent Gateway Website, and the Account Registration form.
- The delegate's name and email address provided by the agent are prepopulated; click Continue.



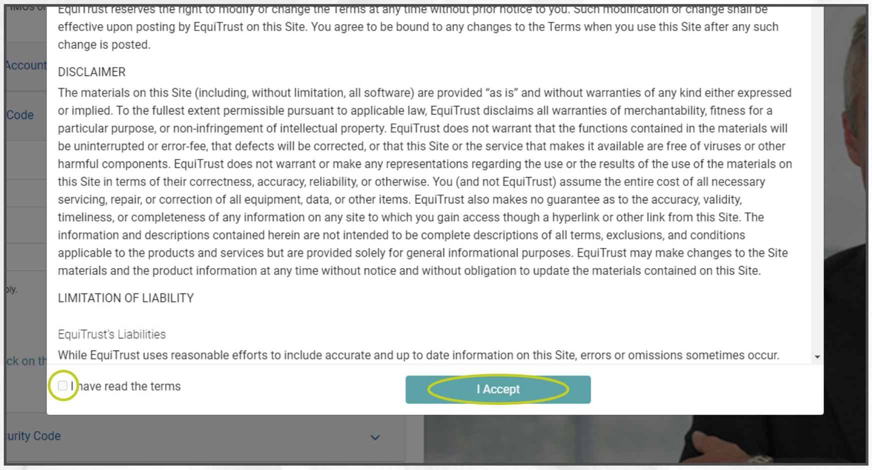
- The delegate's User Name will appear in the Account Registration. The User Name for Delegate Accounts cannot be changed. Jot down the User Name, as it will be needed later in the registration process.
- Enter a password that conforms to the required characteristics; Confirm Password; click Next.



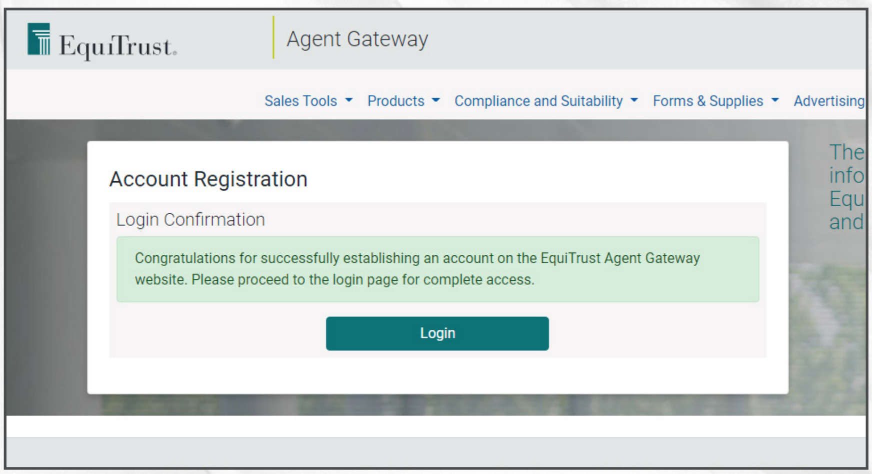
- The next step is Multi-Factor Authentication (MFA) setup. Only one MFA setup is required. Choose among:
    - Security Questions
    - Text Message Security Code
    - Authentication App Security Code
- Select preferred MFA setup option, and click Register.



• Terms of Service Agreement will appear. At bottom, check I have read the terms, and then I Accept.



• When Authentication is validated, click Register.
• The registration process should be a complete, and a confirmation will display.
• Delegate may now login.

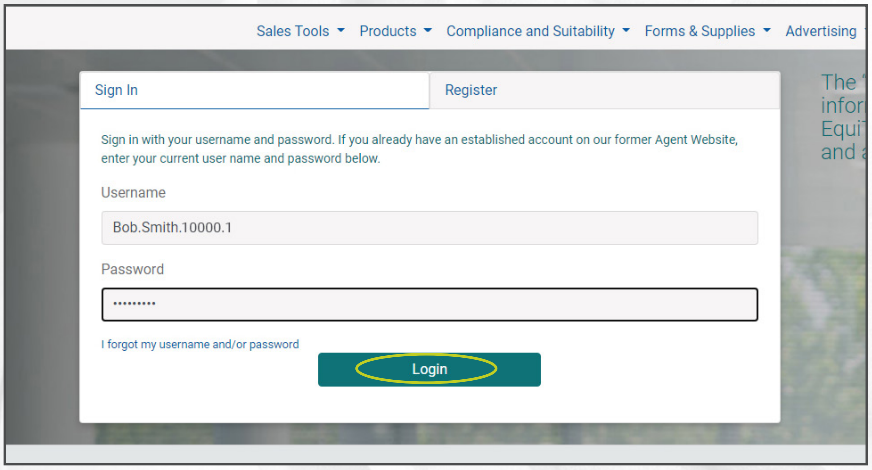


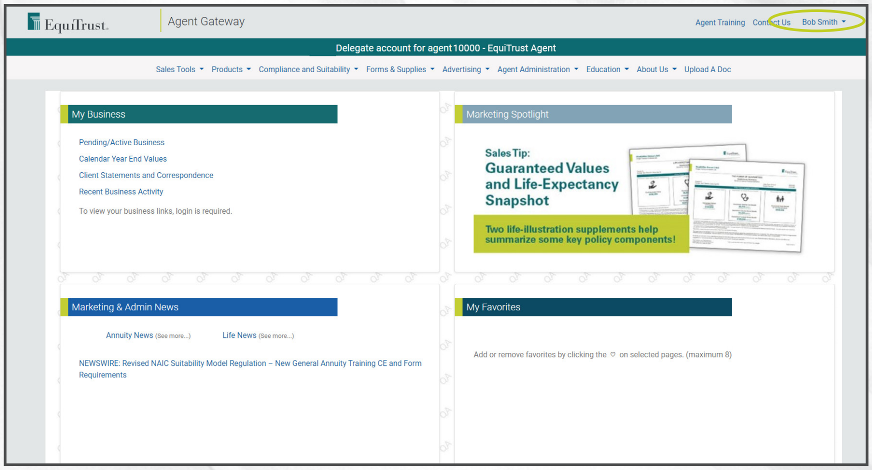
Confirmation Email When Delegate Account is Established

• A confirmation email will be sent to both the authorizing agent and registering delegate upon successful registration of a Delegate Account.

Login to the Delegate Account

- On the login page, select Sign In, and enter delegate User Name and Password.
- If Text or Authentication app were enabled, MFA Validation will be required.
- Login to the Delegate Account should be complete.

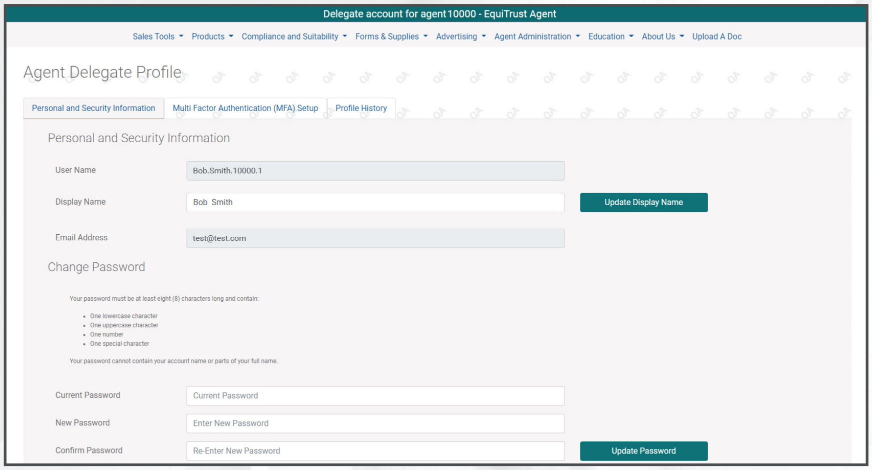




- Delegate will have secured access to the Agent Gateway Website, including the Permission fields specified by the authorizing agent.

Delegate Profile Changes

- Click the delegate display name in the upper right corner to open Agent Delegate Profile.
- Here, the delegate may
  - Update the delegate's Display Name (not to be confused with the User Name); click Personal & Security Information, then Update Display Name
  - Update MFA Setup, click Multi-Factor Authentication (MFA) Setup tab.
  - View delegate's Profile History



Resetting a Delegate Account Password

- If the delegate's password is either forgotten or expires, a password reset authorization may be initiated in one of three ways:
    - By the authorizing agent, in the Manage Delegate field; for the appropriate delegate, click Re set Password.
    - At the Delegate Account Login page, delegate selects: Forgot Password.
    - Call EquiTrust Sales Support – at 866-598-3694.
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- The emailed link must be used to reset the Delegate Account password; resetting a Delegate Account password through standard website access is not possible.
- Upon successful password reset, an email confirmation will be sent to both the authorizing agent and the delegate.

Delegate Accounts for Multiple Agents

- Support personnel who assist more than one agent may have multiple Delegate Accounts.
- Data for a given agent's business will only be accessible within the Delegate Account for the respective authorizing agent.

Questions?
Call EquiTrust Sales Support at 866-598-3694
Or email Sales.Support@EquiTrust.com

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