



# USER GUIDE

**Personalize staff access to your  
EquiTrust business through  
delegate accounts**

Guide to using delegate accounts  
on [Agents.EquiTrust.com](https://Agents.EquiTrust.com)

**Did you know you can authorize delegate access for each of your office team members to the EquiTrust agent website — Agents.EquiTrust.com? Delegate accounts provide secure access to business data categories you designate.**

## You're in the driver's seat

For your delegate accounts, you can manage:

- Who gets access
- Password reset
- Scope of their access
- Deletion of delegate accounts as needed
- Modification of access parameters

Let's get started.

## FOR AGENTS

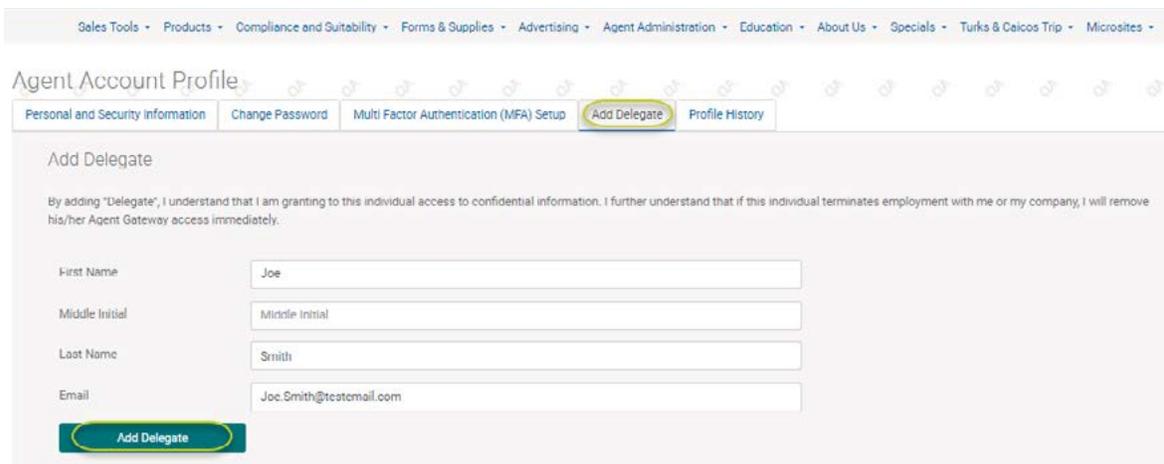
### Adding delegates

Start by logging in to your account on the agent website, and then follow these steps:

- Click on your display name in the upper right corner to open your Agent Account Profile.

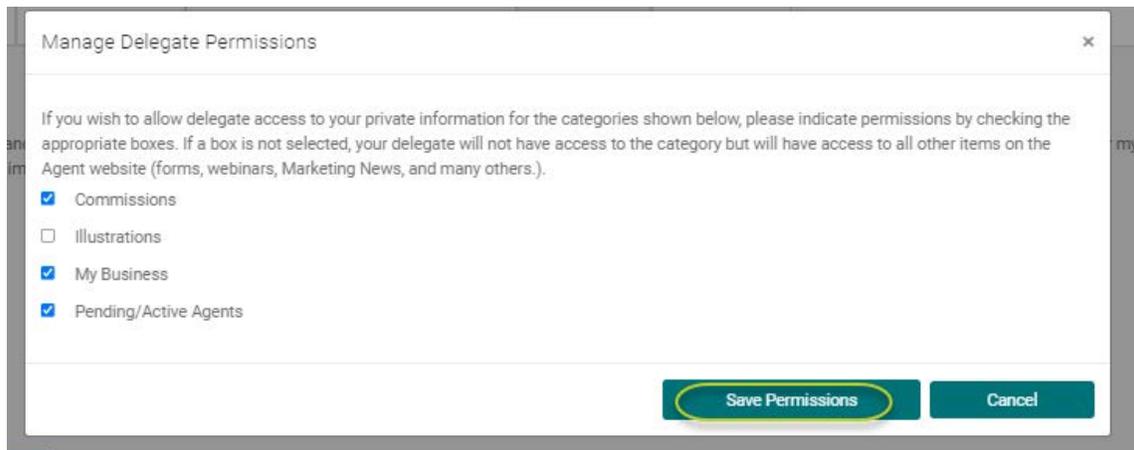


- Click on the Add Delegate tab.

A screenshot of the 'Agent Account Profile' page. The page has a navigation bar with various tabs: 'Personal and Security Information', 'Change Password', 'Multi Factor Authentication (MFA) Setup', 'Add Delegate', and 'Profile History'. The 'Add Delegate' tab is selected and circled in yellow. Below the tabs, there is a section titled 'Add Delegate' with a disclaimer: 'By adding "Delegate", I understand that I am granting to this individual access to confidential information. I further understand that if this individual terminates employment with me or my company, I will remove his/her Agent Gateway access immediately.' Below the disclaimer are four input fields: 'First Name' (Joe), 'Middle Initial' (Middle Initial), 'Last Name' (Smith), and 'Email' (Joe.Smith@testmail.com). An 'Add Delegate' button is at the bottom, circled in yellow.

- Complete the fields for the delegate and click Add Delegate.

- The delegate can have access — permissions — to your private information in one or more categories. Select these now and click Save Permissions.



- When the delegate has been added, you'll see a "Success!" message, and within minutes, the delegate will receive an email with a secure registration link.
- After the delegate has registered, a confirmation email will be sent to you and the delegate.

**PRO TIP:** Want to add more delegates? Under the "Success!" message, click Add Another Delegate to repeat the process and add all your delegates.

## Agent Account Profile

Personal and Security Information | Change Password | Multi Factor Authentication (MFA) Setup | **Add Delegate** | Manage Delegate | Profile History

### Add Delegate

By adding "Delegate", I understand that I am granting to this individual access to confidential information. I further understand that if this individual terminates employment with me or my company, I will remove his/her Agent Gateway access immediately.

First Name

Middle Initial

Last Name

Email

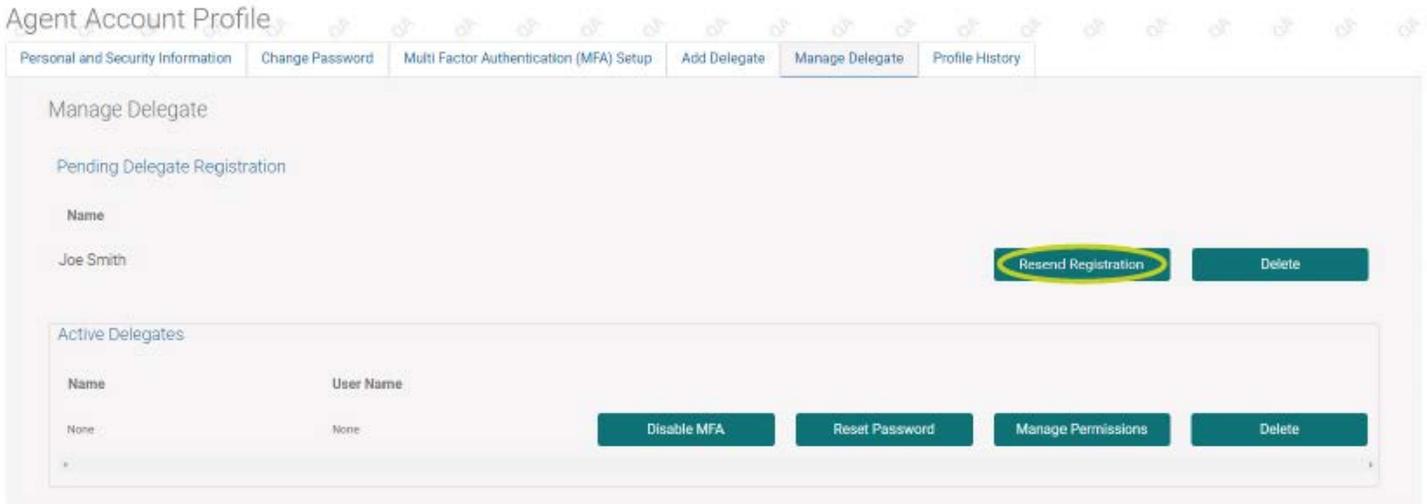
Success! Your delegate has been added to your account. An email with instructions to start the registration process has been sent to your delegate.

Add Another Delegate | Go To Manage Delegates

## What if the registration link doesn't work?

The secure registration link will expire if it's not used within 72 hours, but you can resend the link.

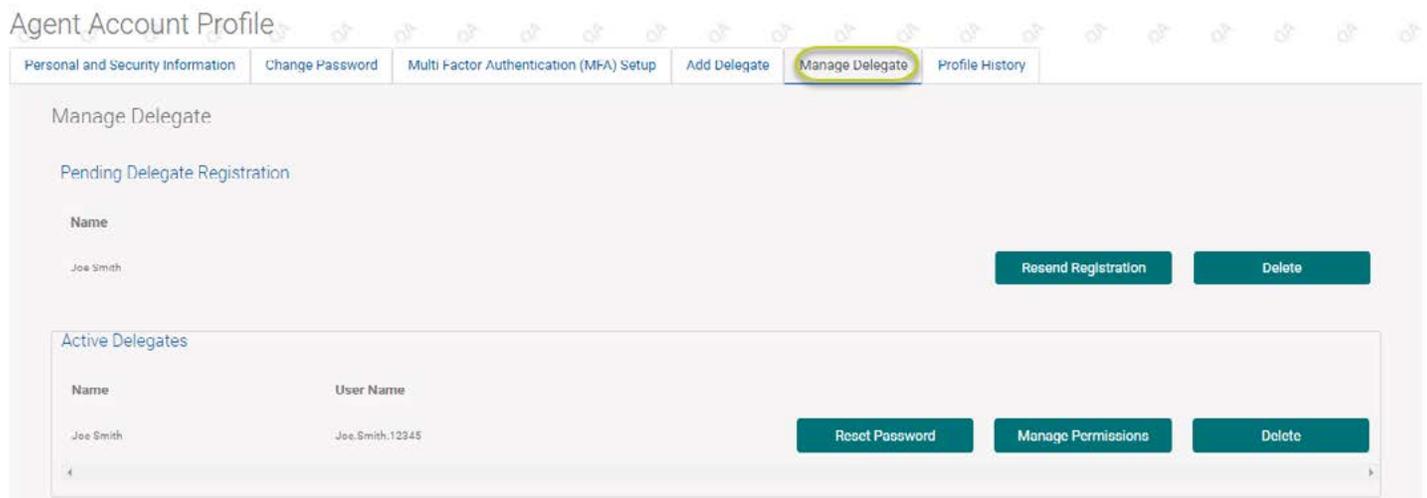
- Navigate to Manage Delegate under your Agent Account Profile. Click Resend Registration for the appropriate delegate. This option will appear 72 hours after the delegate email has been sent.
- The delegate will receive a new registration email and link.



## Managing delegate accounts

Under the Manage Delegate tab, you have the power to perform several tasks:

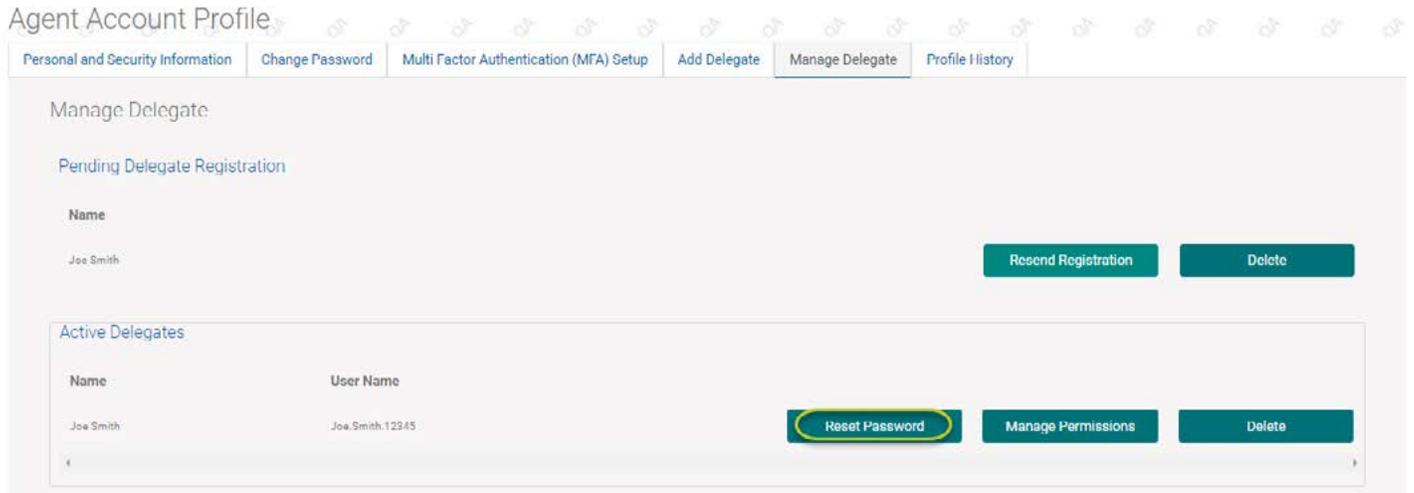
- Disable multi-factor authentication
- Authorize a password reset for a delegate
- Change permissions
- Delete a delegate account



## Two ways to reset a delegate password

If a delegate's password is forgotten or expires, a password reset authorization may be initiated in one of two ways:

- You as the authorizing agent may click Reset Password under the Manage Delegate tab.
- Call EquiTrust Sales Support at 866-598-3694.



- The delegate will receive an email with a secure link to reset the password.
- When reset, you and the delegate will each receive an email confirmation.

## FOR DELEGATES

### Delegate registration

When the authorizing agent submits the Add Delegate request, the delegate receives a welcome email including a secure link to register a delegate account under the agent's authority.

**Welcome to the EquiTrust Agent Gateway Website!**

At the request of EquiTrust Agent, 12345, 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**

The linked printable flyer provides additional information and navigation tips. [Click Here](#)

**Questions?**

Call EquiTrust Sales Support at **866-598-3694**.

We look forward to working with you!

**PRO TIP:** This secure link must be used to register the delegate account; registering through standard agent website access is not possible.

- The registration email link opens the Account Registration form on the agent website. The form is pre-populated with the delegate's name and email address.
- Click Continue.

**Account Registration**

First Name

Middle Name

Last Name

Email Address

[Continue](#)

- The delegate’s user name assigned can’t be changed — take note as it will be needed later in the process.
- Create and confirm a password; click Next.

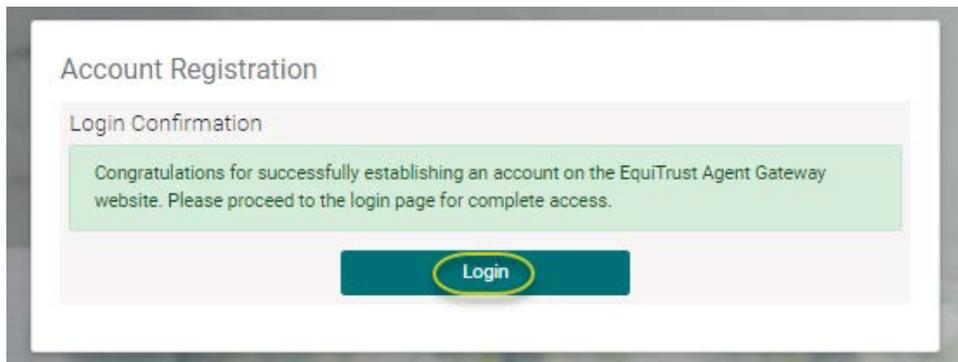
## Setting up multi-factor authentication (MFA)

This step is required only once for each delegate.

- Choose from the MFA options shown below, then click Register.
  - ✓ Security questions for account recovery
  - ✓ Text message security code
  - ✓ Authentication app security code

- View the Terms of Service and click I Accept.

- When authentication is validated, click Register; you'll see a confirmation message.
- The delegate can now log in.

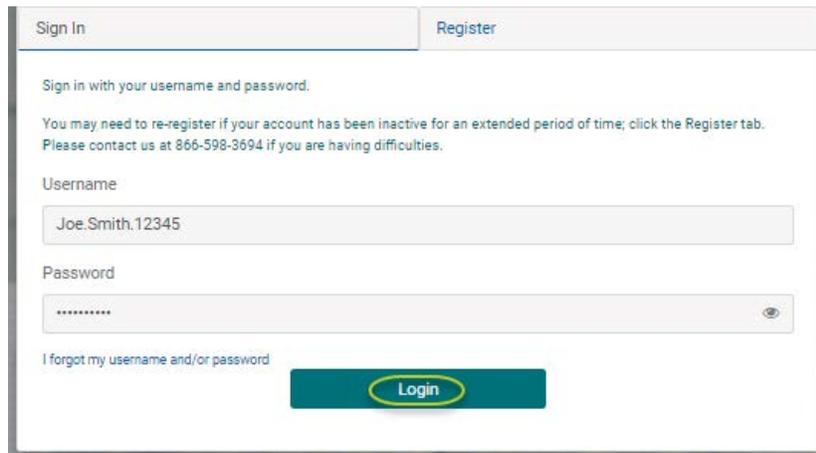


- Both the delegate and the authorizing agent will receive a confirmation email.

### Logging in to the delegate account

Navigate to the sign-in page on the agent website.

- Select Sign In and complete the delegate user name and password.
- Complete MFA validation.

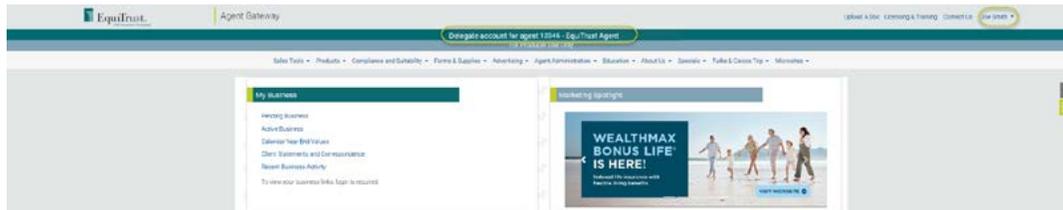


- The delegate now has secure access to the agent website, including the designated permission fields.

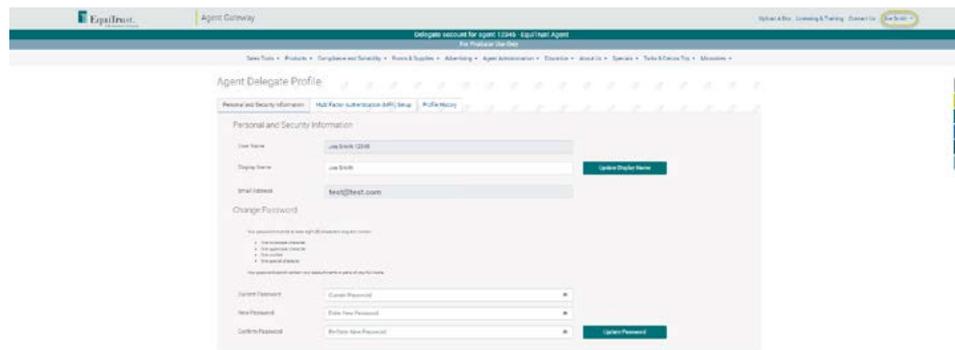
## Managing delegate profile changes

It's easy to make updates to a delegate profile.

- Click the delegate's display name in the upper right corner.



- On the Agent Delegate Profile page, the delegate may:
  - ✓ Update their display name under Personal & Security
  - ✓ Update MFA setup
  - ✓ View their profile history



## Can someone have a delegate account for more than one agent?

Yes! Support personnel who assist more than one agent may have multiple delegate accounts. Data accessible under each delegate account is unique for each respective authorizing agent.

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**Questions?** Contact Sales Support at 866-598-3694 or [Sales.Support@EquiTrust.com](mailto:Sales.Support@EquiTrust.com).

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