AGENT APP QUICK START GUIDE





Login screen

- Enter the same username and password you use for Agents.EquiTrust.com.
- Accept the Terms of Use.

Homescreen

- At any time, click the EquiTrust logo at the top of your screen to return to the home page.
- Tap the three dots : to find our contact information, manage your settings and turn on notifications.
- The highlighted numbers 7 indicate how many unread alerts you have for each section.



< EquiTrust	New Business	Ī	:
	Alerts		
Suitability			2
NIGO Require	ements		2
Contract Mai	iled		1
Select Searc	h Criteria	_	
	Search		
	View All		

New Business

- View unread alerts, organized by category.
- "Select Search Criteria" allows you to search your pending business by name, product or contract number.



Training

• View training requirements for each product and view your completed training history.

← Training	Ī	:
Agent Training History		
Product Training Modules		





Products

• Learn about EquiTrust products and view information including product features, rates, state approvals and state variations.



Sales Tools

• Run an illustration, get answers to frequently asked questions and get the latest news and sales ideas from our Sales and Marketing team.

K EquiTrust	Sales Tools	T	:
Marketing Al	erts		6
Illustrations			
FAQs			





Active Business

- View unread alerts, organized by category.
- Search and view most recent client statements by contract number, client name or product.



Agent Admin

• View alerts and find detailed commission information.

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Agency Aler	ts		
Commission	S		

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Financial	s		
Compan	y Ratings		
Contact	a Department		
Mailing A	Address		
Website			

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About EquiTrust

• Find detailed company information including financial strength, ratings and contact information.



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