



Agent Contracting Instructions

UNDER 65 HEALTH PRODUCTS

Noted below are specific instructions for each carrier's NEW appointment process. If you are requesting a TRANSFER, please contact the PPI Admin listed for transfer instructions.

UNDER 65 HEALTH

- Aliera:** Request a contracting link from *Anna* (annap@ppisales.info)
- Altrua:** Request a contract from *Sarah* (sarahm@ppisales.info)
- Medi-Share:** Request a contracting link from *Terri S* (terris@ppisales.info)
- VEBA:** Request a contracting link from *Terri S* (terris@ppisales.info)

LIFE & ANCILLARY

- CUL/Family Life:** Request a contract link from *Sarah* (sarahm@ppisales.info)
- Gerber Life:** Complete through our SuranceBay portal (see instructions below) – This is a Just-In-Time Appointment. You will not receive a writing number until you have submitted your first piece of business. Contact Jenny for application submission instructions. – *Jenny* (jennyb@ppisales.info)
- National General:** Request a contract link from *Terri S* (terris@ppisales.info)
- Phoenix Life:** Complete through our SuranceBay portal (see instructions below) – This is a Just-In-Time Appointment. You will not receive a writing number until you have submitted your first piece of business to Phoenix Life. – *Jenny* (jennyb@ppisales.info)

SURANCEBAY INSTRUCTIONS:

Our PPI SuranceBay website* -<https://surelc.surancebay.com/sbweb/agency/347>

If this is your first time on our SuranceBay site, select "New User" and create a profile. Once your profile is complete, you can "Request Appointment" for the carriers you would like to represent.

***NOTE:** If you have previously set up a profile with SuranceBay through another FMO, you will need to create a NEW profile through the PPI portal (<https://surelc.surancebay.com/sbweb/agency/347>).

For **CONTRACTING** related questions, contact our contracting team at 864-228-2635, or email the PPI Admin listed next to the carrier above.

For **MARKETING, SALES** or **PRODUCT** information, contact Robert Nance (robertn@ppisales.info) – 864-228-2635