Operations *Snapshot*

Who to reach out to when you need assistance!

Contracting

- **Contracting@equisfinancial.com**
- Assisting with contract requests and inquiries regarding carrier contracting status
- Updating, renewing, and adding licenses, banking information, AML (Anti-Money Laundering), and E&O (Errors and Omissions) coverage
- Processing contracting requests for Advanced Market carriers, as submitted by the Regional Manager

New Business

- **NewBusiness@equisfinancial.com**
- Modifying policy information, including carrier name, product, and coverage amount
- Addressing inquiries regarding emails received from carriers about a policy
- Requesting exceptions for unreported business
- Requesting policies to be marked or updated as paid

Leads

- **Leads@equisfinancial.com**
- Questions regarding Integrity's LeadCENTER
- Purchasing leads
- Setting up lead campaigns

Events

- **Events@equisfinancial.com**
- Information for events
- Tickets, hotels, dates, etc.

Hierarchies & Compensation

- **AgentAdmin@equisfinancial.com**
- Managing all compensation and hierarchy change requests within Equis
- Resolving issues related to compensation or hierarchy changes with carriers

Business Development

- **BizDev@equisfinancial.com**
- Unlocking or reactivating an agent
- Confirming if an agent is eligible to change hierarchies

Agent Chat

- Located on your Agent Dashboard
- Chat directly with an Equis team member
- Here to assist you with all your needs Monday - Friday 8:30 AM - 8 PM ET

Equis Retirement Solutions

- **EquisRetirementSolutions@equisfinancial.com**
- Becoming a Debt Elimination / Retirement Solutions Specialist
- Referring business for Retirement Solutions services
- Retirement Solutions' events