AGENT BASICS

EQUIS
FINANCIAL
AN INTEGRITY COMPANY

BE A PROFESSIONAL LIGHT
Care properly for your client's needs. Your mindset is either your biggest asset or your biggest obstacle. Remember your WHY.

STORE DIGITAL COPIES OF APPS
Keep copies of apps digitally. Utilize a secondary form of storage for safekeeping. Refrain from using and keeping paper copies of apps. If you need help learning how to store apps digitally, please reach out to our Equis team.

STRIVE TO SHARPEN YOUR SKILLS
Read appropriate and relevant literature, listen to podcast training, and attend training meetings when available. If you aren't growing, you're dying. Having uphill dreams and downhill habits gets you nowhere.

MONITOR PENDING
Use non-productive time to monitor pending. The biggest mistakes we see are 7-10 days after submission, when the likelihood of that app going to paid status is dwindling. It is your responsibility to follow up and ensure the carrier has everything they need!

KEEP AN UPDATED CALENDAR
Add important dates to your calendar - license renewals, E&O Expirations, AML training, continuing education, etc. Keep your calendar updated so you never miss important events and deadlines.