

Operations *Snapshot*

Who to reach out to when you need assistance!

Contracting@equisfinancial.com



- Requesting contracting for Advanced Market carriers (sent by Regional Manager)
- Updating / renewing / adding licenses, banking information, AML and E&O
- Assistance with filling out contract requests / questions on carrier contracting status

Leads@equisfinancial.com



- OPT! or Lead Center issues
- Questions regarding Standing Lead Orders

NewBusiness@equisfinancial.com



- Change policy information (carrier name, product, amount etc.)
- Questions regarding emails sent from carriers on a policy
- Request exceptions for unreported business
- Request a policy be marked / updated to paid

BizDev@equisfinancial.com



- Unlock / reactivate an agent
- Confirm if an agent is free to change hierarchies

AgentAdmin@equisfinancial.com



- All compensation and hierarchy change requests within Equis
- Issues with compensation or hierarchy changes with the carriers

Events@equisfinancial.com



- ALL things events
- Tickets, hotels, dates, etc.

EquisRetirementSolutions@equisfinancial.com



- All things Debt Elimination and retirement-based
- Retirement Solutions Events

Agent Chat



- Here to assist you with all your needs Monday - Friday 8:30 AM - 8 PM ET