



EQUIMARK INSURANCE AGENCY, LLC

PHONE: 802-773-6500

Life Insurance and Annuity Contracting Procedure

Producer Set Up

- The Producer Set Up Packet needs to be completed the packet require the additional documents listed below:
 - Copy of State Licenses that you want to be contracted
 - Copy of current E & O coverage
 - Copy of AML training (within last two years)
 - Copy of voided check for commission deposits
 - Annuity Business:
 - Carrier Specific Product Training – a link for product training will be sent to you
 - NAIC State Specific training – A copy of your Certificate of Completion should be included as well (Most states require – a few are exempt AR, NM, UT, FL, NY, VT, NV & NC)
- [Click here to access Producer Set Packet](#)
- Once you are set up as a Producer, you will receive login credentials to ECA Marketing's website and/or a contracting link to complete the appointments with carriers.
 - The website will allow you to add any additional contracting requests: Adding Carriers and States
 - Policy Status reporting
 - Forms and EApps
 - Easy quotes for Term Life and SPIA's
 - Product Training
- [Click here to access Online Contracting Set Up Instructions](#)
- Veronica Cote will be the point person to send the above Producer Set Up Packet as well as application for new business. Upon submitting life business please let me know if exams will be ordered by yourself or not. (Please keep in mind some carriers will order parameds upon receipt of application and initial tele-interview completion)
- Veronica's contact info: Email: Veronica.Cote@EquimarkInsurance.com or Phone: 802-773-6500