

Sure LC FAQ's

Step #1: Registration

1 - If you are new to Surancebay, select 'New User' and 'Create an Account' – be sure to select doing business as an individual (If you are contracting as a licensed business, please reach out to your upline in telegram main chat before you begin)

2 - If you were previously contracted with another IMO and used Surancebay, you MUST login with a different email not used with your previous IMO. Once logged in, verify it's showing FFL.

Step #2. Profile Section

1 - My Profile: complete this section in its entirety

2 - Doing Business As: individual

3 - Bank Info: upload your banking information & voided check here

4 - Licenses: verify your license is NOT listed as temporary, if it is please reach out to your upline in telegram main chat

5 - FINRA: answer "NO"

6 - Questions: complete this section in its entirety

7 - History: complete this section in its entirety

8 - CE & Training: complete the information & upload your AMAM AML

9 - E&O Insurance: complete the information & upload your E&O here

10 - Signature: sign

11 - Profile Documents: upload any additional documents here

12 - Verify you DO NOT have any red dots next to the items above. If you do, you missed something. Go back into that tab and complete it before you're able to move on.

Tips to Follow:

1 - You will need to submit a contract for each carrier once you receive the link via email

2 - You are NOT submitting any new business with the contract (so choose no)

3 - You only need to complete the information surrounded in red

4 - The question about an LTC Rider (choose no)

5 - If at any point there is something that comes up in your background check or credit check, you will need to write a letter of explanation and include any copies of court documents and/or supporting documents. Email the person requesting the documents and upload them to Surancebay directly via the "Profile Documents" tab.

6 - In place of a voided check, we can accept a letter from your bank. It must be signed by a bank representative and include your routing number, account number, and personal information on the bank letterhead. These are the ONLY two options for setting up direct deposit payments. They won't accept deposit slips, bank cards, or anything other than a check or bank letter-head.

7 - Most carriers have a 2-14 business day processing time for your contract (as long as no additional information is requested). You will receive your writing numbers from each carrier directly.