

AGENCY  
SERVICES  
INCORPORATED

Dear Valued Agent:

We appreciate your consideration in allowing Agency Services, Inc. to address your life insurance appointment needs.

In order to complete your licensing request, please complete the following Producer Set-up Packet. In the future when you request an appointment with another carrier, just let us know which carrier, and we will be able to submit it without requesting more licensing paperwork.

***Please make sure ALL QUESTIONS ARE ANSWERED so we will be able to complete your appointment in a timely manner.***

Once the Producer Set-up Packet has been completed, you will also have a few more forms to sign and submit. (See list below.) Signing and submitting the Signature Authorization Page authorizes Agency Services, Inc. to submit your information through our online licensing program. ***Please respond to any email you may receive from SuranceBay asking you to confirm your contracting, as it is a legal document and necessary for you to complete the contracting process.*** Signing the EFT Authorization allows for carriers to directly deposit your commissions.

- 1) Producer Set-up Packet [CLICK HERE](#) to link to a fillable form.
- 2) Signed Signature Authorization Form
- 3) Electronic Funds Transfer (EFT) Form & Voided Check (PLEASE COMPLETE, as it is mandatory with most carriers)
- 4) Copy of CORPORATE state insurance (only if paying to firm)
- 5) Copy of current E&O Certificate....ASI offers free E&O coverage for business written through our office [CLICK HERE](#) to request details!
- 6) Copy of current TN LTC Partnership Certificate (if selling Long Term-Care-expires every 2 years) [CLICK HERE](#) for discounted LTC Partnership Training!
- 7) **Please complete the AML section** under the Licenses section. If you have not taken the course, please mark the "NONE" box. If answer is "OTHER", please attach certificate. [CLICK HERE](#) for free AML training!

These documents may be faxed to 901-685-9811 or emailed to [asmith@agency-services.com](mailto:asmith@agency-services.com). Please contact Ashley Smith at 901-767-4271 with any questions.