



## Agent Contracting Instructions

### UNDER 65 HEALTH PRODUCTS

Noted below are specific instructions for each carrier's NEW appointment process. If you are requesting a TRANSFER, please contact the PPI Admin listed for transfer instructions.

#### UNDER 65 HEALTH

- Aliera:** Request a contracting link from *Anna* (annap@ppisales.info)
- Medi-Share:** Request a contracting link from *Terri S* (terris@ppisales.info)

#### LIFE & ANCILLARY

- CUL/Family Life:** Request a contract link from *Sarah* (sarahm@ppisales.info)
- Gerber Life:** Complete through our SuranceBay portal (see instructions below) – *Haley* (haleyp@ppisales.info)
- National General:** Request a contract link from *Terri S* (terris@ppisales.info)
- Phoenix Life:** Complete through our SuranceBay portal (see instructions below) – This is a Just-In-Time Appointment. You will not receive a writing number until you have submitted your first piece of business to Phoenix Life. – *Haley* (haleyp@ppisales.info)

#### SURANCEBAY INSTRUCTIONS:

Our PPI SuranceBay website\* -<https://surelc.surancebay.com/sbweb/agency/347>

If this is your first time on our SuranceBay site, select "New User" and create a profile. Once your profile is complete, you can "Request Appointment" for the carriers you would like to represent.

**\*NOTE:** If you have previously set up a profile with SuranceBay through another FMO, you will need to create a NEW profile through the PPI portal (<https://surelc.surancebay.com/sbweb/agency/347>).

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For **CONTRACTING** related questions, contact our contracting team at 864-228-2635, or email the PPI Admin listed next to the carrier above.

For **MARKETING, SALES** or **PRODUCT** information, contact Robert Nance ([robertn@ppisales.info](mailto:robertn@ppisales.info)) – 864-228-2635