The Fisher Agency

Financial Advisors Since 1975

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GUGGENHEIM LIFE & ANNUITY

Agent Contracting Instructions

1) Complete and sign all forms in the **glc SGA Contracting Forms.pdf**.
2) Complete and sign Page 34 of **Business Guidelines Certification** (The last page in the **glc Business Guidelines.pdf**). Include a copy of the Business Guidelines Certification with your other contacting forms.
3) Complete and sign Page 16 of the **Guggenheim Product Training Course**. (The last page in the **glc Internal Training Req.pdf**). Include a copy of the Course Completion page with your other contracting forms.
4) Provide a copy of your **Texas Insurance License**.
5) Provide proof of **Errors & Omissions** coverage.
6) Provide proof that you have completed the **Annuity Certification Training Course (Texas)**.

   If you have NOT completed this course, you **must** do so **BEFORE** submitting an Annuity Application. You may complete the course at **www.WebCE.com** or **www.SuccessCE.com**.

   As of 09/01/2011, 8 hours of annuity specific training must be completed during the agent's 2-year Group 1 licensing period. If you have completed this additional training, please provide proof of completion. If you are exempt from the additional training, please provide a copy of the exemption letter you received from the Texas Department of Insurance.
7) Provide proof that you are current on **Anti-Money Laundering Training**.

   You must complete annual AML Training BEFORE submitting an Annuity Application. Annual AML Training is available at https://aml.limra.com.

   If you have not registered on the LIMRA website before, you will enter a "username" which consists of the first 4 letters of your last name (if your last name is less than 4 letters use all letters in your last name) and the last 6 digits of your social security number. Your password consists of your full last name.

   Example Name & SSN: John Smith 123-45-6789 – Username: smit456789 – Password: smith

NOTE: You can submit your Agent Contracting Forms with your first annuity application directly to Guggenheim.

Please mail, email, or fax a copy of the Personal Data Sheet to The Fisher Agency.

Call us if you have any questions.

Sales & Service Forms are available on our website: www.MrAnnuity.com

Office Hours: 9:00 – 4:00 Monday through Thursday & 9:00 – 12:00 on Fridays