

## MANHATTAN LIFE

### Producer Application for Appointment Packet

- 1) Complete and sign **all pages** in this packet using black or blue ball point pen only.
- 2) Complete **Product Specific Training** and provide **Certificate of Completion**. (Note: the Annuity Training Modules are available at [www.MrAnnuity.com](http://www.MrAnnuity.com) in the forms and downloads section.)
  - a. **Manhattan Life Annuity Product Training** (Print out the Certificate of Completion – last page – and include a copy along with other Appointment forms.)
- 3) Provide a copy of your **Texas Insurance License**.
- 4) 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](http://www.WebCE.com) or [www.SuccessCE.com](http://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.

- 5) Provide proof that you are current on **Anti-Money Laundering Training**.

You must complete AML Training every 2 years **BEFORE** submitting an Annuity Application. 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 if ALL of the above requirements are complete.**

**Please mail, email, or fax a copy of all required forms to The Fisher Agency.**

Call The Fisher Agency if you have any questions.

#### **DANNY FISHER, CLU, CHFC**

**The Fisher Agency, Inc. ♦ 13140 Coit Road, Suite 102 ♦ Dallas, TX 75240-5797**

**972-238-1450 ♦ 800-822-1450 ♦ Fax: 972-680-0562 ♦ Danny@MrAnnuity.com**

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

**Sales & Service Forms are available on our website: [www.MrAnnuity.com](http://www.MrAnnuity.com)**