The Fisher Agency

Financial Advisors Since 1975

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OXFORD LIFE (OXL)

Agent Contracting Instructions

You MUST complete ALL of the following requirements BEFORE you submit an Annuity application!

1) Contact The Fisher Agency and request Agent Contracting forms for Oxford Life.
2) We will email the forms to you as quickly as possible.
3) Once you receive the forms, complete the fillable forms as instructed.

Have the following documents available for reference while you enter information:

- Current copy of your **Group 1 Texas Insurance License**.
- **Errors & Omissions** is NOT required, but if you have coverage, provide Carrier & Policy #.
- The **Bank Routing** & **Account Numbers** where commissions are to be Direct Deposited.
- Certification that you have completed the **Annuity Certification Training Course (Texas)**.
  The course is available 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.
- **Anti-Money Laundering 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 cannot complete the required **Oxford Life Annuity Training** (available at www.OxfordLife.com) until you have been assigned an agent number, which may take 2 weeks or longer!

Please mail, email, or fax a copy of your 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**

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