








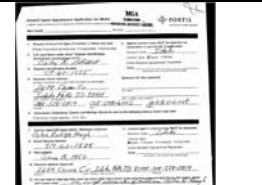
# Assurant Training for Agents with Simmons Benefits Group, Inc.

Check off all items in this guide as you implement Assurant's Health Access solution for a changing market. For assistance call Peter at Simmons Benefit Group, Idaho Falls, ID. Phone 800-337-5407 Ext. 1009.

## Getting Appointed with Assurant through SBGI's IEZ Quote System


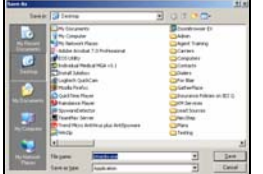






Ask your managing agent at SBGI for your user name and password to this free on-line Internet system.

User Name: \_\_\_\_\_ Password: \_\_\_\_\_

<p><b>W</b> Select the Members tab for <a href="http://www.IEZQuote.com">www.IEZQuote.com</a>.</p>	<p><b>W</b> Agree to the Terms of Use (bottom of page).</p>	<p><b>W</b> Agent's Main Menu—click My Info to add your information.</p>	<p><b>W</b> Add Public and Private Information through beneficiary (2nd pg).</p>
			
<p><b>W</b> Click Application Forms and find appointment form for Assurant.</p>	<p><b>W</b> Appointment Forms are data-populated! Fill in the blanks and print.</p>	<p><b>W</b> Add your Insurance License and E &amp; O contract.</p>	<p><b>W</b> Fax Completed Forms to 208-227-1788.</p>
			

## Quoting with Assurant's Individual Medical Desktop Software

After logging into [www.iezquote.com/members](http://www.iezquote.com/members), click on the [Software/Mobile Office Updates](#) link under the Navigator, then right-click on "**Button 4: Time Individual Medical**" and select Save Target As to save file imsetupmga.exe to your Desktop. After downloading the file, double click to install it.





<p><b>W</b> Download Desktop Software from IEZ Quote (Button 4).</p>	<p><b>W</b> Save IM Quoting Software to your Desktop then install.</p>	<p><b>W</b> Launch program and Enter Agency Data from the Tools Menu.</p>	<p><b>W</b> Enter Agent Profile from the Tools Menu.</p>
			
<p><b>W</b> Enter Client Information starting with the ZIP Code.</p>	<p><b>W</b> Print Manager with selectable sections.</p>	<p><b>W</b> Delivery Letter by email or postal mail.</p>	<p><b>W</b> Upload to Assurant's EASE procedure (more on this later).</p>
			

# Insurance Products from Assurant, starting with their new Health Access plan









So many people can't afford an HMO or PPO plan that Assurant's Health Access is the best solution.

<p><b>W</b> <a href="#">Health Access—Individuals &amp; Families.</a></p> 	<p><b>W</b> <a href="#">Health Access—Employers.</a></p> 	<p><b>W</b> <a href="#">Health Access—Employees.</a></p> 	<p><b>W</b> <a href="#">One Decreasing Deductible.</a></p> 
<p><b>W</b> <a href="#">SaveRight Elite.</a></p> 	<p><b>W</b> <a href="#">CoreMed Elite.</a></p> 	<p><b>W</b> <a href="#">MaxPlan Elite.</a></p> 	<p><b>W</b> <a href="#">RightStart Elite</a></p> 
<p><b>W</b> <a href="#">Temporary Health Insurance.</a></p> 	<p><b>W</b> <a href="#">HealthSaver.</a></p> 	<p><b>W</b> <a href="#">Patient Care.</a></p> 	<p><b>W</b> <a href="#">TelaDoc Medical Services.</a></p> 

# Track Pending, Production, and Commissions with SBGI's IEZ Quote System

<p><b>W</b> Click the Members tab for <a href="http://www.IEZQuote.com">www.IEZQuote.com</a> and log in.</p> 	<p><b>W</b> <a href="#">Pending for Assurant clients is posted daily.</a></p> 	<p><b>W</b> <a href="#">Monthly Production Summary Reports with a few clicks</a></p> 	<p><b>W</b> <a href="#">Commissions are paid and posted biweekly.</a></p> 
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# Generate Leads, Referrals and Ancillary Sales with SBGI's IEZ Quote System

<p><b>W</b> Main Menu—click Orders under Contacts and Leads.</p> 	<p><b>W</b> Use the Phone Interview Screen for telemarketed leads.</p> 	<p><b>W</b> Our fast leads delivery system is free of charge.</p> 	<p><b>W</b> Lead Details with contact manager.</p> 
<p><b>W</b> Add your Individual Referrals, too.</p> 	<p><b>W</b> Clients have a Portal to IEZ Quote, too!</p> 	<p><b>W</b> Clients can access Online Products.</p> 	<p><b>W</b> And a Life Insurance Quote Engine.</p> 

## Agent Library at AssurantHealthSales.com

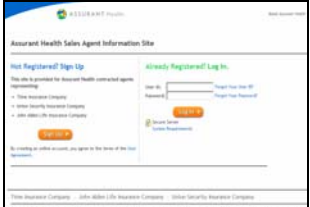

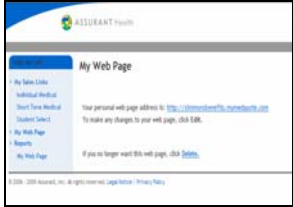
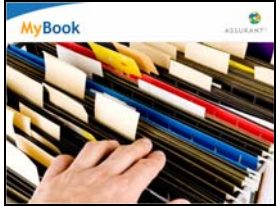
After getting your Assurant number (1-2 weeks), set up an account on the [www.AssurantHealthSales.com](http://www.AssurantHealthSales.com) Web site.

Assurant #: \_\_\_\_\_ User Name: \_\_\_\_\_ Password: \_\_\_\_\_

<p><b>W</b> Setting up a Web account with Assurant (your agent number is required).</p>	<p><b>W</b> Agent Library link then click "Start Here".</p>	<p><b>W</b> Click on Quoting (Assurant's Online Quoting).</p>	<p><b>W</b> NEW Quote and Submit Individual Plans for Employees.</p>
			
<p><b>W</b> Take a Test Drive (link on the Sales Home page).</p>	<p><b>W</b> SuiteSolutions.</p>	<p><b>W</b> HSA Basics Elite.</p>	<p><b>W</b> KeyMed—limited benefit hospital/surgical plan.</p>
			

## Additional Sales Support with Assurant's Web site

Assurant's Web site offers so much more:

<p><b>W</b> Log in with your user name and password.</p>	<p><b>W</b> Find a Form: Select a State then a Category for a list of all applicable forms.</p>	<p><b>W</b> <a href="#">Free Website you can personalize and distribute to all your clients!</a></p>	<p><b>W</b> My Book: Your book of business with a contact manager.</p>
			

As soon as you've sold one Health Access plan with SBGI, you get a free Concorde Ballpoint Pen & Roller Ball Gift Set. Submit this form with all the check boxes marked off and fax this form to us with your signature:

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

After you've sold five (5) Health Access or other Major Medical policies with Assurant through SBGI, you've earned a Weathertec Shoreline Jacket. The item can be found on the [www.AssurantHealthSales.com](http://www.AssurantHealthSales.com) site under the Assurant Merchandise and Active Wear option. Th