

YOUR ONBOARDING PROCESS WITH LEGACY FULL CIRCLE

a Step-by-Step Guide

[WATCH WELCOME GUIDE HERE](#)



1 CONTRACT

- VERIFIED LICENSING AND CONTRACT SUBMITTED
 - E & O + AML CERTIFICATES
 - PRODUCT TRAINING/STATE TRAINING
 - AWAIT CARRIER APPROVAL NOTICE

2 GET ORGANIZED INTRODUCTION

RELATIONSHIP MANAGER

part 1

SET-UP LFC PORTAL LOG-IN

- SET UP CARRIER
- PRODUCT TRAINING INFORMATION
- QUOTES

3 GETTING STARTED LFC NEW AGENT RESOURCES

PRE-RECORDED TRAININGS

- NEW AGENT WELCOME
- LIFE 101 + "HOW TO" 20 YEAR TERM GUIDE
- ANNUITY 101
- LIFE SALES



4 INTRODUCTION TO RESOURCES RELATIONSHIP MANAGER *part 2*

ADVANCED PREPARATION:

- INTRODUCTION TO CASE DESIGN TEAM
- ANSWER ADDITIONAL QUESTIONS

5 AGENT PORTAL

ONGOING PREPARATION

For more training and valuable resources to expand your business and knowledge log-in to our agent portal. Live training videos and more!