



Infiniti Financial Partners

Writing Your First Application with Mutual of Omaha

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Use virtual mentor for yourself and to run the quote. Best practice is to leave the optional filters (type of coverage) blank. Only fill in personal info and health info

Use the Mutual of Omaha - Term Life Express. You can run quotes from the link in VM. Do 15 years (or longer if you want). 15 year or longer pays full commission. You'll likely cancel this policy after the first year and upgrade to a more advanced market or investment-oriented policy after you learn the next level of our business. Then you'll get paid the new commission as well

To write the application (since you are not fully contracted yet with MOO) you'll write the eApp through our 'Formpipe' (which is iPipeline's document section). You can access that through the upper left menu in HQ (which looks like 9 dots in a square) or through the application link in Virtual Mentor

The app will be under "United of Omaha" for company name (sister company with Mutual of Omaha)

Make sure you do Term Life Express (and not Term Life Answers). Select the eApp option

Get the coverage you need, but even if you just do it for something minimal like \$10/month this exercise is critical for understand the entire process. It's also important to actually have what we provide for clients

When writing the eApp you will proceed as a "guest" when you get to that point as you don't have your official MOO login

Info for a few fields that you will need to enter are as follows:

General Agent Office ID: SFG

General Agency Name: Symmetry

Your agent ID (aka producer number): last 7 digits of your SSN

Date hierarchy begins: today's date

*note: all of that info will be automatically populated once you are officially contracted and access applications through the carrier website. Submitting this application will expedite your contracting to get your Agent login back sooner

Upon completion of the application signature, you will submit it directly through the portal. You also need to download a pdf copy of the application to submit into Opt

You only need the free version of Opt. Do not pay for Opt Premium.

In Opt under the “My Leads” menu, add a “referral with application”. Just follow the information flow to fill in the required fields and upload the pdf copy of the application. You may need to shrink the file if this first app is too large to upload. You can do that by clicking the print button and just re-saving to pdf as a new file. You can also go to online2pdf.com and shrink the file size. Once it is uploaded into opt you are done.

This is the process you will always follow:

Write and submit the eApp online to the carrier, always going directly through the carrier website. We only use Formpipe to access the application if you are not officially appointed with the carrier yet.

Download a pdf copy of the application and submit that into Opt in your lead or as a referral if it is not from an existing lead