



GETTING STARTED WITH LEVINSON & ASSOCIATES

LEVINSON & ASSOCIATES APPOINTMENT TIPS



Levinson & Associates uses an electronic contracting platform to streamline your appointment process.

Please follow the below steps to get started and take advantage of all Levinson & Associates has to offer today!

To get started with us please complete the below steps depending on your new business status:

GETTING STARTED WITH A NEW PIECE OF BUSINESS/APPLICATION:

- Step 1** Complete your onboarding request by [clicking here](#).
- Step 2** Submit your new business to apps@carylevinson.com, or fax to 954-746-9535.
- Step 3** Our contracting team will send you a personalized link to complete the online contracting platform.

To view detailed training on completing the online contracting platform please [click here](#).

GETTING STARTED WITHOUT A NEW PIECE OF BUSINESS:

- Step 1** Request access to the Levinson Platform by [clicking here](#).
- Step 2** Check your email for your electronic onboarding packet, or [click here](#) to access now. The onboarding packet will need to be completed with your e-signature
- Step 3** Once you complete your onboarding packet you will be emailed access to carylevinson.com within 24 hours.
- Step 4:** Submit your future business to apps@carylevinson.com, or fax to 954-746-9535.
- Step 5** When new business is submitted our contracting team will send you a personalized link to complete the online contracting

E&O



Levinson Agents have access to a discounted E&O plan please [click here](#) to quote and apply today!

To access discounted CE courses please [click here](#).

TRAINING



Long Term Care business requires an initial 8-hour course prior to writing business. If you have already taken the 8-hour course you are required to complete a 4 hour refresher course every two years. To access Long Term Care training resources [click here](#).

If writing an Annuity or a Long-Term Care application, state and carrier training must be completed prior to the signed date of the application.

Most Carrier Annuity Product training can be done on RegEd, Quest CE and LIMRA. [Click here](#) to view all carrier required training.

APPOINTMENTS

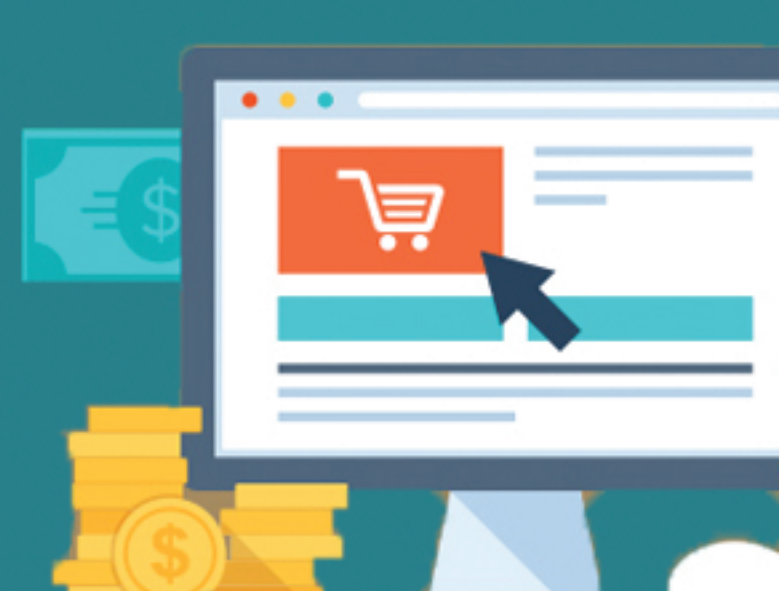


Certain carriers require pre-appointment - please [click here](#) to view a listing of those carriers.

Not all carrier appointments will be processed immediately, as most carriers require new business submission in order to issue an agent code. Contracting submissions with new business are prioritized to expedite new business. To view processing guidelines please [click here](#). To view dual contracting, and processing guidelines please [click here](#).

Please Note: Many carriers do not process non-resident state appointments until new business is received. Also, be advised each state has its own appointment window. If you have business in a non-resident state please let us know. When sending in new business if you are not currently appointed please **DO NOT** date the applications.

COMMISSIONS



To view carrier advance commission details please [click here](#).

All commission inquiries can be sent to contracting@carylevinson.com

SPECIAL BONUS!



To Enroll in our "Leads for Contracting" bonus please [click here](#).