Completing Carrier Contracts Online

Step by Step instructions for all Carrier Contracts

- Log onto naacontracting.com
- Click on NAA & Carrier Contracting link on the left
- Choose the carrier you are wanting to submit contracting paperwork and click next

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Home Choose a Carrier		
Resources	۲	
💐 My NAA		
🔅 My Leads		Step 1 :: Choose Carrier(s)
💌 Instant Purchase		Check the box next to each carrier you would like to be contracted with.
😽 Sales Training		Carriers
搅 NAA Contract - Example		Toggle Check All
FasTract	۲	
📻 FasTract a New Recruit		FasTract: New Agent Contract - Updated 5/18/10
📁 Invite a New Recruit		FasTract: Pre-Authorized Check Agreement
		Foresters: Foresters New Contract
Invitation Templates		Monumental: Monumental Life New Contract
🔟 FasTract Report		RBC Insurance: New Agent Contract
Contracting	۲	You can get to all online carrier contracts by
📄 My Contracts		clicking on the NAA & Carrier Contract Tab once
NAA® & Carrier Contracting	g	you have logged into naacontracting.com. Check
inistration 7	*	the carrier you wish to complete and click the
💿 🖌 age Agent Sev rgs		next tab

- Read all preliminary materials before you start to fill out the questionnaire
- Answer all questions on each tab. Use the next button to go to the next tab and previous to go back to the previous tab
- Click Finish when you are done answering the questions. If you have missed anything it will tell you what is missing and take you back to that question
- Note: You cannot come back and finish the questionnaire later so please be sure that you have 5-15 minutes to answer all the questions and save them

Home Choose a Carrier Preliminary Reading				
Resources	۲			
💐 My NAA				
🔅 My Leads		Step 2 :: Instructions & Reading Material		
💌 Instant Purchase		You have indicated that you wish to complete the following documents:		
🐼 Sales Training		Foresters: Foresters New Contract		
📆 NAA Contract - Example		Below are instructions and reading material for each carrier you have chosen. We encourage you to take a few		
FasTract	۲	moments to read over each peliminary document before proceeding to the next step.		
📻 FasTract a New Recruit		Foresters: Instructions & Reading		
📁 Invite a New Recruit		• 🐡 3 Easy Steps 🖗		
 Invitation Templates FasTract Report 		🕼 All documents marked with 🤹 are new and must be read before proceeding.		
Contracting	۲	🕞 Previous 🕑 Next		
📄 My Contracts		You must open any required		
🦧 NAA® & Carrier Contractin	ng	materials and read them before proceeding by clicking the Next		
Administration	۲	button		
🚳 Manage Agent Settings				

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ENAA Online	÷С	ontracting		
1.2.48			Sector 1	
Home Choose a Carrier		eliminary Readi	Online Contracting Alert	
Resources	۲			
💐 My NAA		_	You must open and read each document listed as new before proceeding.	
🐞 My Leads		Step 2 :: Instr		
💌 Instant Purchase		You have indi		
💽 Sales Training		• Fo		
📆 NAA Contract - Example		🕕 Below ar		en. We encourage you to take a few
FasTract	۲	moments	he	next step.
🐖 FasTract a New Recruit		Foresters: I		
📁 Invite a New Recruit		• 🥋 3 Easy 3	Steps ^같	
		A		
Invitation Templates	Ify	you fail to re	nents marked with Thore new and must be read before proce	ive the
🔢 FasTract Report			ead any required element you will rece	
Contracting			g. You must open all documents with t	
My Contracts			nbol before you will be allowed to pro	oceed
🥡 NAA® & Carrier Contractio	wi	th completi	ng contract.	
Administration	۲			
🔞 Manage Agent Settings				



You will need to answer all of the questions in each tab. Once you are in the last tab you will click finish to save your answers and the document will be compiled into a PDF document for your signature. If you miss any required fields, you will be taken back to that page and not allowed to finish and save until everything is completed. You cannot save a partial contract so please be sure you are ready to complete all the tabs.

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Finish

Next

Previous

- After you have saved your contract, the next step is to Create an Electronic Signature
- Click Create Electronic Signature
- Follow the on screen directions.
- Please Note: This is a one time set up so if you have previously set up and used an electronic signature you can skip to step Four

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Welcome Mister (NAA168026)

Home = My Contracts = Choose Signature Method			
🔯 Things To-Do 🛛 🚷	Sign Your Document	Click	
Signature Needed for New Agent Contract Agreement	Below are the options you have for signing y		
(NAA®)	Document Name: NAA New Agent Cont	ract 💈	
	Signature Options		
	Electronic Signature: Completely paper-less signature process.	X You do not have an eSignature setup Create Electronic Signature	
	Hard Copy Signature: Prints out only the pages you need to sign.	📝 Start Hard Copy Signature	

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SAA Electron	hic Signature		Home Support Logou
1.2.37	no olghataro		Welcome Mister (NAA168026)
💽 Things To-Do 🛛 🕱	Create an Electronic Signature	•	
1 Signature Needed for New Agent Contract Agreement (NAA®)		c signature which will be used to sign docu rmation, and choose your signature style be	
	Signature Options		
	Type Your Signature Name This must be your legal name Last 4 of your Social Security Mother's Maiden Name		
	Signature Style	⊙ John Hancock ⊖ John Hancock ⊖ John Hanc ock	○ <i>Gehn Hanweuk</i> ○ Joh n Hancoc k ○ _S ohn Hancock
			🕤 Next

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Fill in the 3 boxes with the proper information, choose the signature you would like to use and click Next



Home | Support | Logout

Welcome Mister (NAA168026)



- You will need to verify your NAA password and your email address and click to confirm your identity
- Please note: this is your password and not your NAA number

🔯 Things To-Do 🛛 🕱	Confirm your identity
1 Signature Needed for New Agent Contract Agreement (NAA®)	For security purposes, NAA® requires that you type your password again to verify your identity. NAA® Password: Email Address: This is the email address you currently have This is the email address you currently have with NAA®. Important Information The electronic signature process requires that you have adobe 9 or nigher. You can download the latest version of adobe reader from The Adobe Website.

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This is asking for the password you just set up and your email address. Once entered Click on the Click to Confirm Identity Box.

Sign and Submit the Agreement

- This is the last step of the process!!!!
- You will need to verify your identity for legal purposes and then click the yellow boxes and hit Submit to NAA

Electronically Sign Your Document

Welcome Mister (NAA168026)

🔯 Things To-Do 🛛 😤	Electronically Sign Your Document
1 Signature Needed for New	Click the button below to electronically sign your document.
Agent Contract Agreement (NAA®)	Document
	New Agent Contract Agreement 05/12/10 Sign Now Click Here Important Information The electronic signature process requires that you have adobe 9 or higher. You can download the latest version of adobe reader from The Adobe Website.

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Review Your Document

At this step you will see your contract, have a chance to review it and click to sign and submit the agreement electronically to NAA

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9. I understand and acknowledge that if I have no E&O coverage that NAA does not provide it for me and that I am responsible for my own coverage.

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Find

The parties herein agree that this Agreement will be executed as of the later of the two dates below.

AGENT

2 / 13

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130% 💌

NATIONAL AGENTS ALLIANCE

Click To Sign) (SE	AL)
SIGNED eSigned: 7D881255F8B09Click To Sign	SIGNED	
Mister Whiskers		
PRINT NAME	PRINT NAME	_
DATE	DATE	—

Please fax this form to:

PRINT CLEARLY / KEEP A COPY FOR YOUR RECORDS

Click the "Click to Sign" Yellow box above.

9. I understand and acknowledge that if I have no E&O coverage that NAA does not provide it for me and that I am responsible for my own coverage.

Find

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The parties herein agree that this Agreement will be executed as of the later of the two dates below.

AGENT

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NATIONAL AGENTS ALLIANCE

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	Mister Wh	(SEAL)	(SEAL)
	SIGNED eSigned	: 7D881255F8B097C4 iskers	SIGNED
			PRINT NAME
	This what		DATE
	your electronic signature will look	<i>Please fax this form to</i> PRINT CLEARLY / KEEP A C	
	like when you click submit		rry about the date as that will stamped when you submit
2			

NAA Electronic Signature

- 1. Make sure you have read through the entire document.
- 2. Click ALL of the yellow buttons labeled "Click To Sign".
- 3. Click the button below labeled "Submit To NAA".
- 4. Send additional documents, if any, to Contracting:

fax to: 336-395-6020

Submit To NAA

Click the Submit to NAA button if you have reviewed and are ready to submit

-

👏 Done



If you miss a step, you will receive this error when you hit the submit button and you will be taken back to what you missed

SAA Electronic Signature Successful		Home Support Logout
1.2.37	elcome Mister (NAA168026)	
Resources	Successfully Signed Your Document	
🐼 Sales Training	Ve have successfully received your electronically signed document. If an	y other signatures are required on this
💐 My NAA	document, those individuals will be contacted as well.	
Contracting		
📄 My Contracts		
🦧 NAA® & Carrier Contracting		
	Copyright @	NAA® 2005-2010. All Rights Reserved.

SUCCESS!!!! You have completed your Contract.

Quick Tips from The Contracting Department

- In order for the agent to set up commissions to be paid to a corporation they must hold an insurance license in the name of the corp.
 (If you DO NOT hold an insurance license in the name of your corp you will need to submit your contracting in your individual name until the license is acquired and add the corp at that time)
- Agents setting up a corp must go in FasTract and get a NAA # for the corp and hold 2 NAA #'s (one for the corp and one for the individual)
- For online contracting the agent should log in under their personal NAA number click the carrier and select corporation where appropriate on the questionnaire. Be sure to fill in all primary personal information as well as your corp information.
- Don't forget to send in your supporting documentation (voided check, voided savings deposit slip, bankruptcy information, etc.)
- Be sure that the banking information that you enter on the contract is the same as the voided check that you send
- Be sure to contact your manager for assistance on contracts. They are your number one resource in this business and they know who to contact at NAA Headquarters if there is a question.