

Agent Portal

Quick Find



Find the tools to help you
increase your bottom line

www.avivausa.com/agents



Advertising Guidelines

- ▶ Marketing > Advertising

Application Submission

- ▶ **Document Gateway – Upload scanned image to Home Office:** Doing Business > Document Gateway

CE Credits

- ▶ Marketing > Training > Earn CE Credits

Commission Information

- ▶ **Personal Account Summary – View all activity within your commission account:** My Business > Reports > Compensation > Personal Account Summary
- ▶ **First Year Commission:** My Business > Reports > Compensation > First Year Commission

Company Information

- ▶ **Annual Review and Ratings:** Company Info > Financial Information & Ratings
- ▶ **Home Office Directory:** Company Info > Phone Directory

Demo Site

- ▶ **Take a tour of our Agent Portal:** www.ameruslive.com/demo

E-Mail Addresses

- ▶ **Home Office associate's e-mail:** Company Info > Phone Directory

Forms

- ▶ **Forms Online:** Doing Business > Forms Online
- ▶ **New Business Wizard – Access all the new business forms needed for a case:** Doing Business > New Business Wizard

Illustrations

- ▶ **New Business Illustration:** Illustrations > New Business > Run Illustration
- ▶ **Inforce Illustration:** Illustrations > Inforce > Run Illustration
- ▶ **Software Download:** Illustrations > New Business > Download Software

Interest Rates

- ▶ **New Business Rates:** Products > Interest Rates > Current Rates
- ▶ **Historical S&P 500 Index:** Products > Interest Rates > Current Rates > S&P 500 Index Historical Performance

Marketing

- ▶ **Communications:** Company Info > News
- ▶ **Marketing Materials:** Marketing > Marketing Materials > Sales Catalog

Pending New Business

- ▶ My Business > Pending Business

Policy Information

- ▶ **ALERTs:** My Business > Inforce Business > ALERTs
- ▶ **Annual Statements (Policyholder):** My Business > Inforce Business > Policyholder Annual Statements
- ▶ **Book of Business:** My Business > Inforce Business > Book of Business
- ▶ **Cash Value:** My Business > Inforce Business > Policy Value Inquiry
- ▶ **Policy Changes – Submit request for a policy change, e.g., address change, loan:** My Business > Inforce Business > Change Request
- ▶ **Policy Status – Detail regarding the policy, e.g., premium amount, issue date:** My Business > Inforce Business > Policy Status

Sales Production Information

- ▶ **Sales Report:** My Business > Reports > Production > Sales Report

Software

- ▶ **AMO Documents:** Marketing > Software & Online Tools > AMO Documents
- ▶ **Advanced Markets Online:** Marketing > Software & Online Tools > Advanced Markets Online
- ▶ **Financial Advisor:** Marketing > Software & Online Tools > Financial Advisor
- ▶ **Financial Calculators:** Marketing > Software & Online Tools > Planning Tools
- ▶ **InsMark:** Marketing > Advanced Markets Strategic Resource Center > InsMark
- ▶ **Sales Solutions:** Illustrations > Software Support > Sales Solutions Tips
- ▶ **SalesMaker:** Marketing > Software & Online Tools > Sales Maker
- ▶ **Wealth Planning Suite:** Marketing > Software & Online Tools > Client Presentation Tools

State Approvals

- ▶ Doing Business > State Approvals

Supplies

- ▶ Doing Business > Order Supplies

Training

- ▶ **Webcast Replays:** Marketing > Training > Webcast Archives

Underwriting

- ▶ **Guidelines:** Doing Business > Underwriting > Resources > Guidelines > Medical Underwriting Guidelines Chart
- ▶ **HIPPA Authorization:** Doing Business > Underwriting > Resources > HIPPA Authorization
- ▶ **Calculators:** Doing Business > Underwriting > Resources > Calculators
- ▶ **Large Case:** Doing Business > Underwriting > Resources > Large Case Underwriting
- ▶ **TeleApp Program:** Doing Business > Underwriting > Resources > TeleApp Program

