



GETTING CONTRACTED

1. **Any agent that has previously been contracted with any of the 6 carriers, should call those carriers prior to submitting contracting. Simply ask of those carriers, "When am I eligible to recontract?". This will give us a solid starting point to know when and how to approach the contracting process.**
2. Agents will follow the instructions found at <https://vfa.hierarchybuilder.com/pages/licensed-product-contracting>
3. **Agents will request contracting when they have their first piece of business to submit.**
 - a. Step One Visit Landing Page www.HeirloomLegacyLife.us complete and submit information.
 - b. Step Two the agent will receive a text message requesting Carrier Name and Client Name/Birthdate, once submitted.
 - c. Step Three Agent will receive an email with SureLC Links and Agent Onboarding SOP ([Set up SureLC Account & Submit Carrier Documents](#)).
 - d. Agents will receive a confirmation email within 2 business days of contracting being completed and submitted.
4. Any outstanding requirements will be communicated within one business day of receipt by HLL.
 - a. Agent and Vantage Contracting will be notified by email.
 - b. If outstanding requirements remain outstanding, contracting will be canceled with that carrier after 7 business days.
5. Carrier Processing Times Vary and Agent should anticipate 10-14 business days before receiving acceptance or declination.
 - a. At the conclusion of 2 Weeks: [How to Check On Carrier Contracting Status](#).
 - b. If declination is received, agent will also receive email notification from HLL and Vantage contracting specialist will be copied. Any further reconsideration must be pursued by the agent via the Vantage Contracting Specialist.
6. **Agents will receive a Welcome Letter via email or regular mail directly from the carrier.**
 - a. It is the Agent's responsibility to follow carrier instructions (included in the welcome email) to login and set up the carrier specific portal.
7. Requests for support or assistance email contracting@heirloomlegacylife.com and submit a support ticket in your vantage portal.
 - a. Requests will be responded to within 1 business day.
8. HLL will make a **FREE** training portal available to all agents that are currently contracted through HLL. *(Agent will receive link and instructions to set up, after confirmation of successful contract submission.*
 - a. These will include training on:
 - i. Portal Navigation
 - ii. Product Training
 - iii. Carrier Processes
9. WhatsApp groups will be provided upon approval with one final expense carrier. There will be multiple groups made available, to include:
 - a. [VFA Urgent Client Help Chat](#)
 - b. [VFA Support and Training](#)
10. For additional carrier requests, agent must complete information at the following link:
<https://carrierrequest.heirloomlegacylife.us>
11. Agent will receive email with SureLC link and the same standards for initial contracting will be in place.
12. If you have not received communication as outlined above after you have completed applicable steps please email contracting@HeirloomLegacyLife.com