Who runs our Life and Finance Department?

Brian Dixon is the VP of the Life and Finance department

Will Hanks Life and Finance Coordinator

How do I reach the life department?

[lifequotes@chcquotes.com](mailto:lifequotes@chcquotes.com)

Brian Dixon: 636.328.2824

Will Hanks: whanks@chcagents.com

How do I contract with Plum?

You can find the contracting Link on chcagents.com under the Life Tab “Life Contracting

Register for your Plum Site.

Once Registered you will complete the contracting on the Plum Site.

How do I contract with Quility?

You can find the contracting Link on chcagents.com under the Life Tab “Life Contracting

What carriers do we contract with at Plum?

Core Carriers: SBLI (Accelerated Term), SBLI (Flex Whole Life), L&G (Banner Term),

Assurity (AD&D)

Marketplace Carrier: Corebridge (GIWL, Term), Assurity (DI),

What carriers do we contract with at quality?

NLG, Quility PLUS (SBLI Instant Term), F&G, Forester, Americo, UHL

How do we contract with Mutual of Omaha?

Send request for contracting to [lifequotes@chcquotes.com](mailto:lifequotes@chcquotes.com) along with your Legal Name, email address and NPN.

How do we contract with CICA?

Send request for contracting to [lifequotes@chcquotes.com](mailto:lifequotes@chcquotes.com) along with your Legal Name, email address and NPN.

What is a Jot form?

This is the form to be filled out to request specific carrier contracts to be added to your SureBay Account for Quility.

Who is my direct upline on the Jot Form?

Joseph Krivelow

What is my level?

LOA

What do I do if I already have a SureLC account?

Your register for a new account as it is required for your Quility contracts. Use the provided link on chcagents.com

What does LOA mean?

Licensed Only Agent. This is so that the payroll is handled by Compass Health Consultants. (YOU STILL OWN YOUR BOOK)

Who are our Core Carriers?

SBLI, F&G, MOO, CICA, COREBRIDGE, L&G

Where can I find video training?

You can find training videos on chcagents.com, your plum life portal and your hq portal with Quility.

What types of life insurance do we offer?

We do everything life insurance related except variable products.

Who is our Account Manager at Quility?

Gary Thomas

Who is our Account Manager at Plum?

JP Lopez

Where do I get my AML Training?

Sucessce.com

Where do I get my Best Interest Training?

Sucessce.com

Where do I get my Suitability Training?

Sucessce.com

Can we sell annuities?

We can sell any fixed annuity

Can we sell variable products?

We do not sell variable products

Who do we sell Annuities through?

We sell Annuities through multiple carriers. F&G, MOO, Aspida, NLG, Allianz, Athene