



Contracting and Appointment Instructions

Please complete the enclosed general contracting and appointment packet. The information in this packet will be logged in our contracting system, which stores your information in a secure location along with carrier contracting forms. In the future, when you request to be appointed with new carriers, the stored information shall be used to complete contracting paperwork on your behalf.

By signing this form, you are attesting that the information you are submitting is true and correct. You are also authorizing Secure Life Financial, Inc. to submit your information through the contracting system to select carriers.

Please submit the following information:

1. Completed and signed contracting packet.
2. If you answered yes to any of the background questions, please submit a letter of explanation including the date of the incident as well as proof from the courts.
3. Complete Electronic Funds Transfer packet along with voided check or bank letter with all your information.
4. Copy of Errors and Omissions coverage.
5. Copy of the latest Anti Money Laundering certification if taken through a Broker Dealer or CE firm. If taken through LIMRA, there is no need for a certification, just a completion date.
6. A signed W9 form. (individual & under corporation)
7. Agent license and or business license if applying under a corporation.

Please e-mail all documents to Contact and Licensing Dept. at: contracting@securelifefinancial.com

Or deliver them to any of the following branch offices **Attn: Contract and Licensing Dept.**

Miami Lakes Branch
15280 NW 79th Court,
Suite 103
Miami Lakes, FL, 33016

Texas Branch
600 E. John Carpenter
Fwy, Suite 103
Irving, TX, 75062

California Branch
369 W. Main Street,
Suite D-E
Alhambra, CA, 91801