DISTRIBUTOR ONBOARDING GUIDE

Getting Started with NICforLife

Your Personal Policy Assistant

Everything your firm, your Agents and their Clients need to get up and running.

NICforLife gives policy owners a simple way to stay connected to their coverage and their Agent. Getting your firm set up takes less than 10 minutes. NIC supports you at every stage, from signing up to your Agents' first client policy reviews.

> **No cost to Distributors.** There is no charge for your firm to offer NICforLife to your Agents.

YOUR ROADMAP

START	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Sign up for NFL	Identify agents	Agent webinar	Subscribe	Invite clients	Connect

START ✓

Distributors Sign Up for NICforLife

Responsible: Distributor + NIC

The distributor learns about NICforLife and signs up by emailing NIC. NIC will enable the feature, and then it's time for the Distributor to start marketing to their Agents.

KEY TERMS & CONDITIONS

- **No cost to distributors.** There is no charge for Distributors to offer NICforLife.
- Advisors subscribe to NICforLife through the NIC Agent App.
- Costs to Agents is $10/ month which provides access for up to 250 clients.

ACTION ITEMS

- Sign up for NICforLife by emailing NIC.
- Name a Distributor contact to coordinate with NIC.
- Work with NIC to obtain promotional materials and marketing best practices.

MORE INFORMATION

- NICforLife for Distributors (www.meetnic.com/distributor-nicforlife)
- NICforLife for Agents (www.meetnic.com/agent-nicforlife)
- NICforLife for Clients (www.nicforlife.com)

STEP 1

Identify Participating Agents

Responsible: Distributor

Select the Agents who will take part in NICforLife and invite them to the NICforLife Agent Webinar, hosted by NIC.

ACTION ITEMS

- Build a list of participating agents
- Send agents an NFL introduction email and invite them to the webinar invitation (NIC can provide invitation copy)

Tip: *Start with your tech savvy Agents who are client service oriented*

STEP 2

Invite Your Agents to Attend the Agent Webinar

Responsible: NIC + Distributor + Agents

NIC hosts a live webinar that demonstrates NICforLife and answers Agents' questions, so agents know how the app works for them and their clients.

ACTION ITEMS

- Agents attend the live NICforLife demonstration
- NIC walks through the Agent App and the policy owner experience
- Live Q&A with the NIC team

Tip: *Encourage agents to bring their questions. A recording can be shared with anyone who misses the live session.*

STEP 3

Agents Subscribe to NICforLife

Responsible: Agents

Agents subscribe to NICforLife through the Subscription Centre in the Agent App.

ACTION ITEMS

- Open the Agent App
- Go to the Subscription Centre
- Complete the NICforLife subscription

STEP 4

Agents Invite Their Clients

Responsible: Agents

Once subscribed, Agents invite their Clients to join NICforLife — Your Personal Policy Assistant.

ACTION ITEMS

- Select the Clients to invite
- Send NICforLife invitations to Clients
- Contact clients to make a personal introduction

Tip: *Pair the invitation with a personal note or call so clients know it's coming from their trusted advisor.*

STEP 5

Agents Connect with Clients on NICforLife

Responsible: Agents + Clients

Agents connect with their Clients on NICforLife through the Policy Review Scheduler, document sharing or direct messaging.

ACTION ITEMS

- Open the Policy Review Scheduler
- Schedule policy reviews with clients
- Use reviews to make sure clients' coverage still fits their needs

Tip: *Regular reviews keep clients engaged and uncover new ways to help them.*

Onboarding Checklist

✓	Task	Responsible
☐	**Start:** Sign up for NICforLife by emailing NIC Name a distributor contact to coordinate with NIC	Distributor + NIC
☐	**Step 1:** Build a list of participating agents	Distributor
☐	**Step 1:** Send agents an intro to NICforLife email with the webinar invitation (NIC can provide invitation copy)	Distributor
☐	**Step 2:** Agents attend the live NICforLife demonstration NIC walks through the Agent App and the policy owner experience	NIC + Agents
☐	**Step 3:** Login to the Agent App Go to the Subscription Centre Complete the NICforLife subscription	Agents
☐	**Step 4:** Select the clients to invite Send NICforLife invitations to clients Follow up with clients who haven't joined yet	Agents
☐	**Step 5:** Open the Policy Review Scheduler	Agents + Clients
☐	**Step 5:** Schedule policy reviews with clients	Agents + Clients
☐	**Step 5:** Use reviews to make sure clients' coverage still fits their needs	Agents + Clients

Questions? Your NIC team is here to help.
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www.nicforlife.com

GET STARTED TODAY