



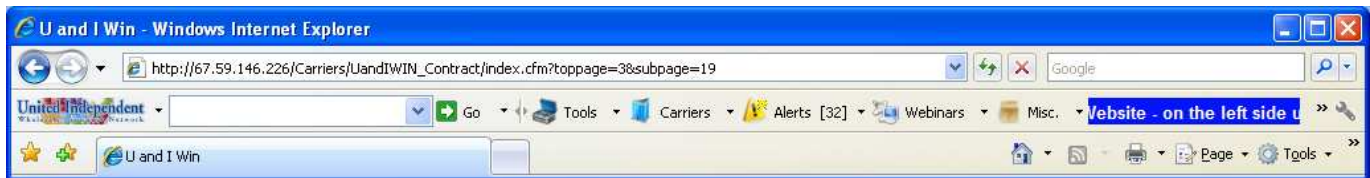
UandiWIN *FAST TRACK* To Success

STEP 1 – Submit your UandiWIN Contracting paperwork

- Go to our website – <http://www.uandiwin.com>
- From the 'Carrier / Contracting' dropdown box, select 'UandiWIN Contract'
- Click on the 'UandiWIN Contract' link. A PDF version of the contract will open. Review the contract. After reviewing the contract move on to the next step.
- Click on 'UandiWIN Contracting Forms'. A PDF version of the contracting forms will open.
 - Click 'File' and 'Print' on the top of your screen.
 - Complete and FAX to the number on the cover sheet.
 - Submit your \$20 Processing fee in one of the following 3 ways:
 - Mail a check made out to "UandiWIN" to the address on the cover sheet.
 - Print and fill out the credit card form available under the 'UandiWIN Contract' links and FAX.
 - Pay quickly online by clicking on the 'Pro Shop' button on the left side of the website homepage.

STEP 2 – Download and install the UandiWIN Toolbar

The UandiWIN Internet Explorer Toolbar is an integral part of working with UandiWIN. Get quick access to all the tools and information you need to be successful.



You will receive a Welcome email after your paperwork is processed by the Home Office that will give you an "Agent ID and Password" that you can use to access the "UandiWIN Agent Resources" section of the website.

- Go to our website – <http://www.uandiwin.com>
- Click on the 'Agent Back Office' button on the left side of the homepage, or select 'Agent Back Office' from the 'Agent Support' dropdown.
- Log In using the Agent ID and Password you were emailed.
 - CLICK on the 'Toolbar' Download link toward the bottom of the page.
 - Follow the directions to install the UandiWIN Toolbar to your Web Browser.

STEP 3 – Set up your Replicating Website

As you move forward with UandIWIN, you can refer agents to your own replicating website to join and earn extra monthly bonus income on sponsored agents in addition to your personal sales!

- Go to our website - <http://www.uandiwin.com>
- Click on the 'Agent Back Office' button on the left side of the homepage, or select 'Agent Back Office' from the 'Agent Support' dropdown.
- Log in using your Agent ID and Password
- Click on 'Set Up/Update Agent Replicating Site'
- Fill out 'Contact Information' section
- In the 'Recruiting PDF Setup' section - upload a picture of your self or your agency (your preference)
- Enter your customer code. It will be your three initials of your name or three initials of your agency name (your preference)
- Click the update button, then call or email Jessica at jsneed@nmgins.com to set up your custom code to receive agent contact info replies directly to your email.

Your replicating website address will be: [www.uandiwin.com/\(your 7-digit agent number\)](http://www.uandiwin.com/(your 7-digit agent number))

For example: If your agent number is 1234567, your replicating website address would be www.uandiwin.com/1234567

If you would like you can recruit by using a website with a name more personalized to your business.

For example your agency is *ABC Insurance* and your current replicating website is:
www.uandiwin.com/1234567

- Go to www.godaddy.com and buy a domain name of your choosing
(Ex. www.abcinsurance.com)
- Once you have purchased the domain name:
 - Log into the *Administrator Settings* at www.godaddy.com
 - Redirect/Forward the domain (www.abcinsurance.com) to your UandIWIN replicating website (www.uandiwin.com/1234567)
- When someone types in your new website/domain (www.abcinsurance.com) they will automatically be redirected to your UandIWIN Agent Replicating Website.

You are now ready to start referring agents to your UandIWIN replicating website and start building your downline residual bonus income!

STEP 4 – Contract with Insurance Carriers

As you consider contracting with Insurance Companies, review the Product Weighting chart for all of the UandIWIN carriers. Products with higher weighting percentages give you higher Bonus Volume!

To find the Product Weighting Chart:

- Go to our website – <http://www.uandiwin.com>
- From the 'Agent Support' dropdown select 'Sales Support'
- Click on the 'Product Weighting Chart'

The Contracting Process

Once you have decided to contract with a company, or several companies, it's time to submit contracting. There are two ways to contract with most UandIWIN Insurance Companies: Paper or Electronic. Each Insurance Company has a separate page on our website. The contracting options available for each carrier will be listed on that carrier's page.

- To find a specific carrier: Go to our website – <http://www.uandiwin.com>

- From the '*Carriers / Contracting*' dropdown, select either '*All Carriers*', or the carrier type that interests you (e.g. Individual Medical, Senior Market)
 - If you selected the '*All Carriers*' option, a page will be displayed listing all available carriers. Click on the name of the specific carrier you want.
 - If you selected a carrier type, a page will be displayed listing all the available carriers in that group. Click on the name of the specific carrier you want.

Paper Contracting

- If paper contracting is an option for the carrier you selected, there will be links labeled '*Contract*' and '*Contract Cover Sheet*'. Simply click on the links to download a PDF copy of the contracting.
- Print, complete, and FAX the completed contract and cover sheet to the fax number on the cover sheet.

Electronic Contracting

If electronic contracting is an option for the carrier you selected there will be a link labeled '*Online Contracting*'. Please note that there is a ten dollar (\$10) fee for each carrier selected using the online contracting option. The '*Online Contracting*' option provides you a streamlined way to contract with multiple companies both now and in the future.

- You may either select '*Online Contracting*' from the '*Carriers / Contracting*' dropdown or click on the '*Online Contracting*' link on a specific carrier's page to be taken to the Efficient Contract Solutions page.
- If you are a first-time user you will be required to complete a setup process. You can expect the following:
 - You will have to create a username and password for the system. These are separate from the username and password you were sent when you contracted with UandIWIN
 - An online interview based on the questions required for the companies you selected. The program will compile a list of all the information required by all the carriers you select. Similar questions will only be asked once and your answers will be stored. In the event you contract with other carriers in the future the database will use your original answers to complete the contracting and will only ask for information you have not already provided.
 - Faxing of documents with copies of your signature and authorizations.
- If you are a return-user and interested in contracting with more carriers, simply log in, select the carriers and answer any of the questions required, if any, that you have not already answered for a previous carrier.

STEP 5 – Sign up for Carrier Website Overview Webinars

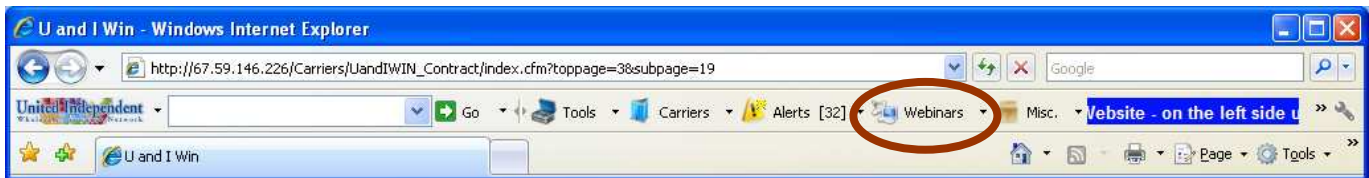
UandIWIN offers Carrier Website Overview webinars for the websites of many of the carriers we represent. These webinars cover important things you need to know to get started such as:

- How to create online quotes.
- How to submit and track business.
- How to communicate with the underwriters.
- How to get Web-based Product Training 24/7 (when available).

To schedule a webinar, call Kathy at the UandIWIN Home Office at (800) 359-0980 ext. 417

STEP 6 – Join us on our “Live” Product Training Webinars and Teleconferences

UandIWIN has weekly Training Webinars and Teleconferences available to you and your downline. A list of scheduled webinars is available on the UandIWIN Toolbar or the UandIWIN Website.



Links to individual webinars are available on the toolbar and website.

To attend a specific webinar:

- Select '*Webinar Calendar*' from the '*Webinar*' dropdown on the toolbar or from the '*Webinars / Training*' dropdown on the website.
- Using the calendar, locate the webinar you would like to attend.
- Click on the webinar link provided.

Check the Event Calendar Regularly as new training is scheduled often!

STEP 7 – Utilize Archived Product Training 24/7

UandiWIN maintains a database of past webinars in the Agent Back Office and the UandiWIN toolbar. So, any time day or night, you can find a webinar you missed, or one you would like to review. There are two ways to get to our Archived Training list.

1. Go to our website (<http://www.uandiwin.com>) and select '*Recordings*' from the '*Webinars / Training*' dropdown. Use the login and password you were emailed when you first contracted with UandiWIN to log in to the Agent Back Office. Once in the Agent Back Office an organized list of the most recent recordings will be displayed. Click on your choice. Also, there are additional product training archives for Final Expense, Term Life and Annuity products available once you register by clicking on the training link on the '*Webinars / Training*' dropdown or by clicking on the buttons located on the left side of our website.
2. If you have the UandiWIN Toolbar installed, click on the '*Webinar*' button then '*Product Training Archives*'. A list of all available recordings will be displayed organized by type, topic or carrier.

Some recordings may require that you register by providing your name and email address.

STEP 8 – Utilize our Recruiting, Prospecting, Marketing and Sales Tools

UandiWIN provides a variety of tools to assist you in recruiting, prospecting, sales and marketing. All these tools are available from our website.

- Go to our website <http://www.uandiwin.com>
- Select '*Prospecting / Recruiting Tools*' from the '*Agent Support*' dropdown.
- A list of tools will be displayed organized by category. Simply click on the tool you would like to use to download a copy to your computer.

STEP 9 – Join the UandiWIN “Downline Development Program.”

Consistent producers and / or recruiters can qualify to join the *Downline Development Program*.

Through this program you receive names of agents that are responding to UandiWIN's National internet and direct marketing campaigns. Spend time calling only interested agents to build your downline business. Click on either link below, print, review, sign and fax to (810) 496-7066.

[Recruiter Downline Development Agreement \(Recruiting Only\)](#)

[Producer Downline Development Agreement \(Recruiting and Producing\)](#)

STEP 10 – Set the following immediate personal goals and the timeline in which you want to accomplish them

A) Maximize your Personal Production Bonus

Do this by selling a minimum of 5-7 average size cases per month. Generally speaking this will generate 2,500 plus in sales volume credits which will pay you monthly bonuses equivalent to General Agent commissions. Focusing on higher volume credit products will generate higher bonuses. At this point, you will also be earning a Personal Sales Volume Bonus.

B) Start Generating Quick Start Bonuses

Accomplish this by sponsoring two agents or teams that generate a minimum of 625 in sales volume credits per month. That is usually 2-3 sales per month from each team. There is no limit to how many teams you can sponsor and you earn Quick Start bonuses on. At this point, you will also be earning Organizational Volume Bonuses.

C) Qualify for Marketing Director

Continue encouraging your first two teams to grow with new sponsored agents and sales. Then sponsor a third agent or team. Once all three teams are generating 7,500 in sales volume credits per quarter, you qualify for Marketing Director bonuses. This is a quarterly bonus you earn on your total sales volume for the quarter.

Congratulations! You are well on your way to a very rewarding and successful future. Even though your income is feeling pretty good, you are just at the beginning of what you can accomplish with the UandIWIN Success System.

Daniel B. Hagy
Managing Partner