



## The VIBE Annuity Sales Checklist

- 1) Complete registration and access:** <https://vibe.amsfsg.com/Login.aspx>
  - ✓ Select "Fixed Index Annuities"
- 2) Submit your Appointment Application**
  - ✓ Contact your licensing department at your insurance agency for carrier appointment and contracting.
- 3) Annuity Rates/Products Tab**
  - ✓ Explore and Find Products
  - ✓ Rider Quoting Tool- Guaranteed Income Options
- 4) Request an Illustration (*Contact us or Electronically*)**
  - ✓ Contact the VIBE Sales Team: 225-525-8423
  - ✓ [VIBE Illustration Request](#)
- 5) NAIC Product Specific Training Tab**
  - ✓ Identify the carrier and product you wish to write
  - ✓ Copy the Product Code, if applicable
  - ✓ Click the Product Specific Training link for the applicable carrier
  - ✓ Follow instructions
- 6) Complete your State Annuity Training (*including Best Interest*)**
  - ✓ Check the required training for the state of the application
  - ✓ If unsure of the state specific annuity training requirements, contact our preferred vendor RegEd at 800-334-8322 or visit [RegEd Annuities Training Platform](#)
- 7) Sales Tools**
  - ✓ Direct Links to each Insurance Carriers Website
  - ✓ Access to client approved material for solutions available
- 8) Submit Annuity Application**
  - ✓ Click on "Electronic Applications"
  - ✓ Click "Launch" to start Firelight e-application
  - ✓ Firelight eApp Training Videos

**Call us if you have any questions!**  
**225.525.8423**