

Contracting Submission Processing

**Contracting step 1: Complete contract application (Carrier specific)**

* If you are contracting your corporation, include your name and social security number as well as the corporation’s name and taxpayer ID number.
* Include proof of current Errors & Omissions (E&0) coverage (declaration page)
* Include proof of completion of Anti-Money Laundering (AML)
* Please complete Direct Deposit Authorization form along with Voided Check. Please complete the form in its entirety.
* If any questions are marked “YES” on the paperwork please attach a letter of explanation signed and dated. This will expedite processing times.

**Contracting step 2: Submit all contracting**

* **Email to** [**Contracting@LegacyFullcircle.com**](mailto:Contracting@LegacyFullcircle.com)
* **Fax to (213)341-2448**
* **Or mail to 903 N. Grand Ave. Covina Ca 91724**
* 7-10 business day processing

**Contracting step 3: Certification of Training Completion**

Required for Annuity Agents only

* Annuity certification is limited to individual carriers
* Please contact [ANNUITIES@LegacyFullCircle.com](mailto:ANNUITIES@LegacyFullCircle.com) (626)214-3013 ext. 106 for further carrier specific certifications.

Required for All Agents:

* Anti-Money Laundering Course
* IUL certification course specific to individual carriers
* Accelerated Benefits Course specific to AGLA
* Please contact [contracting@legacyfullcircle.com](mailto:contracting@legacyfullcircle.com) or 626-214-3013 ext. 100 for further information.

**Contracting step 4: Agent number assigned**

* Agent number will be assigned to agent
* Will include a welcome email and/or packet to be mailed to agent
* Processing times vary based on application being in good order, normal processing times are 7-15 business days.

For any questions or concerns regarding the Contracting submission process, please contact our contracting department.

*Patricia Grano*

*(626)214-3013 ext. 100*

*Fax: (213)341-2448*

[*Contracting@legacyfullcircle.com*](mailto:Contracting@legacyfullcircle.com)