Experience the Power of Collaborative Thinking

How to leverage SalesLink® to boost productivity

Tools, tips and tricks to make doing business with F&G more efficient

F&G's SalesLink agent portal offers an array of resources to help you do business with us.

Like any site, some of its features are front and center, and others require a little more exploration. This guide will help you make the most of the *entire* site and help make your experience working with us as smooth as possible.

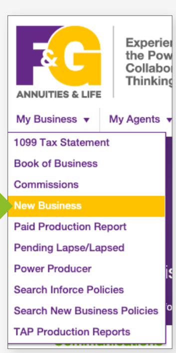
Get updates on newly submitted applications

To start, hover over the SalesLink tab titled **My Business** (A), then select **New Business.**

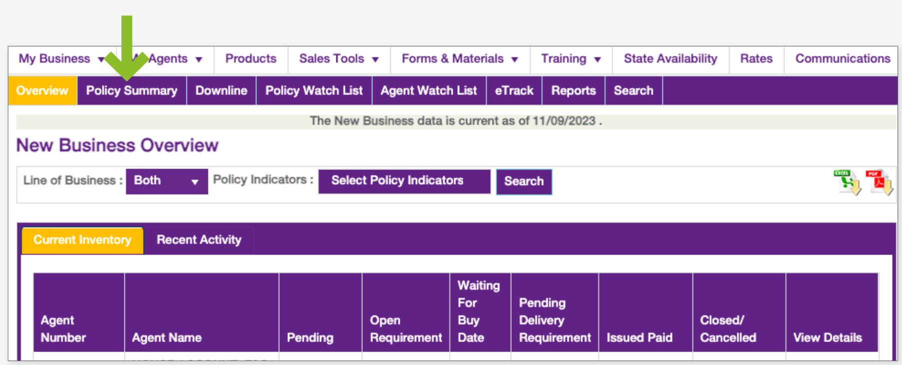
You'll see a screen like this (B), providing an overview of all your pending, issued paid and canceled policies.

Explore individual cases in more detail by clicking **Policy Summary,** then clicking the policy number you'd like to check out.

A



B



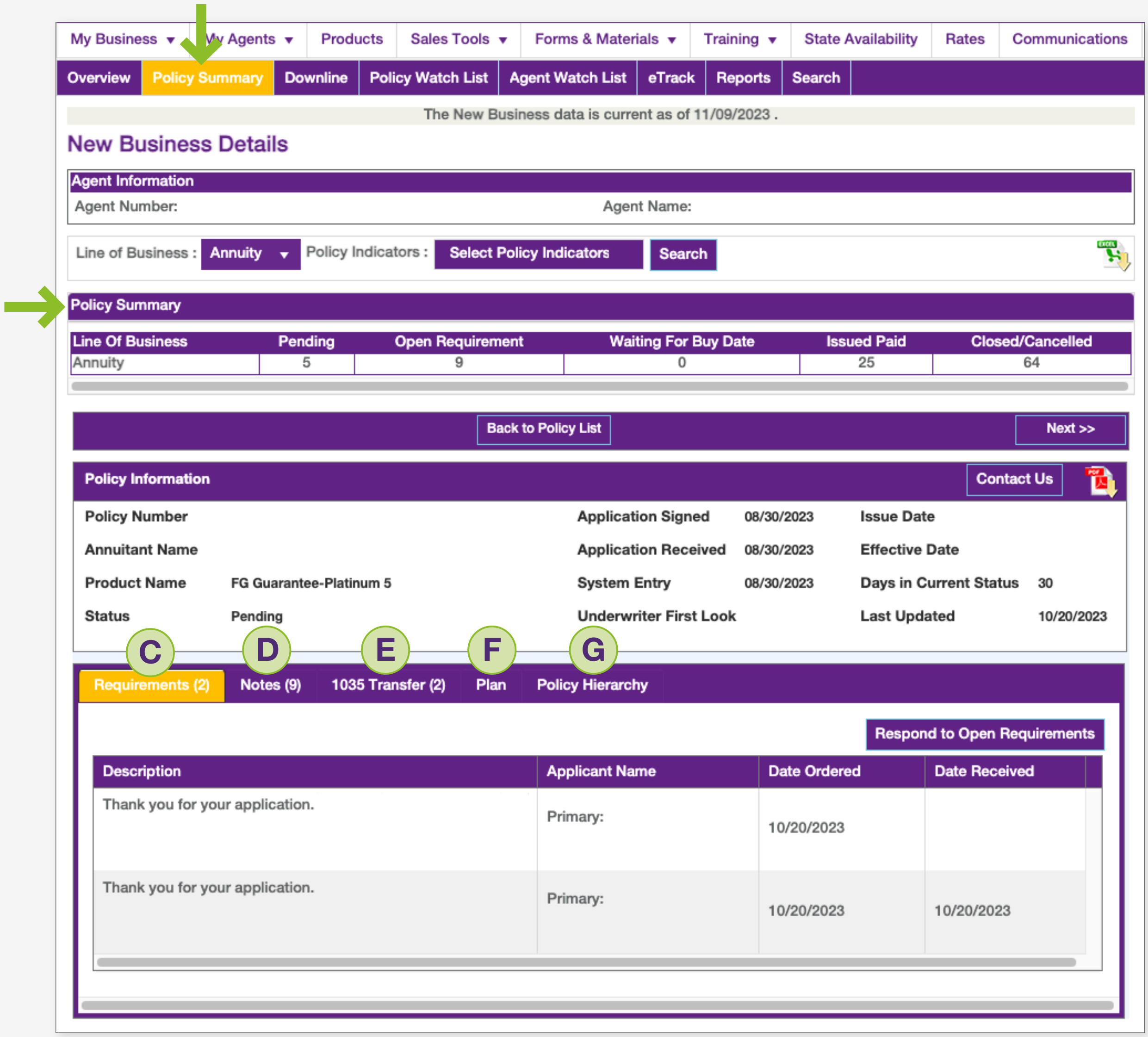
The tabs you see will be tailored to your business, policy status and other factors. Some screenshots may vary.

You'll first be shown cases with active/open requirements. To see all cases, click the **By Status** tab.

ADV5503 (10-2024)
24-1279

Policy Summary

Each tab offers updates on different parts of the application process, including requirements C, notes D, 1035 transfer information E, plan details F and the policy hierarchy G.



For financial professional use only. Not for use with the general public.
Fidelity & Guaranty Life Insurance Company

ADV5503 (10-2024)
24-1279

Do business digitally with the Wizard e-App

For in-depth information, including step-by-step screenshots and the process to complete an application, check out our e-App Help Page and/or the e-App Training Video. If you need access to these resources, contact SalesDesk@fglife.com.

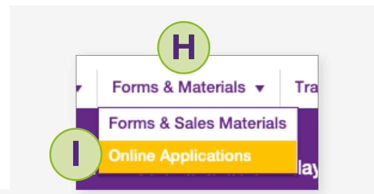
Start with case design and generate an illustration

In SalesLink, generate an illustration and save it to your computer as a PDF. Again, resources to help you with illustrations are available. Contact SalesDesk@fglife.com for more details.

Once your client is ready to apply, you're ready to jump into the Wizard e-App.

Access the Wizard e-App

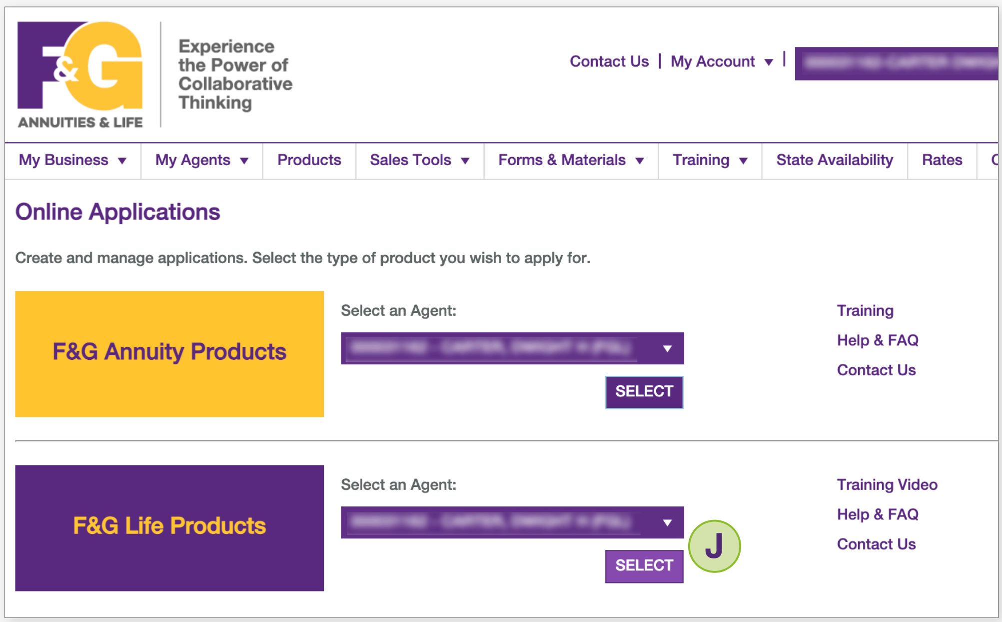
In SalesLink, hover over **Forms and Materials** H, then select **Online Applications** I. You'll see a screen like one shown below.

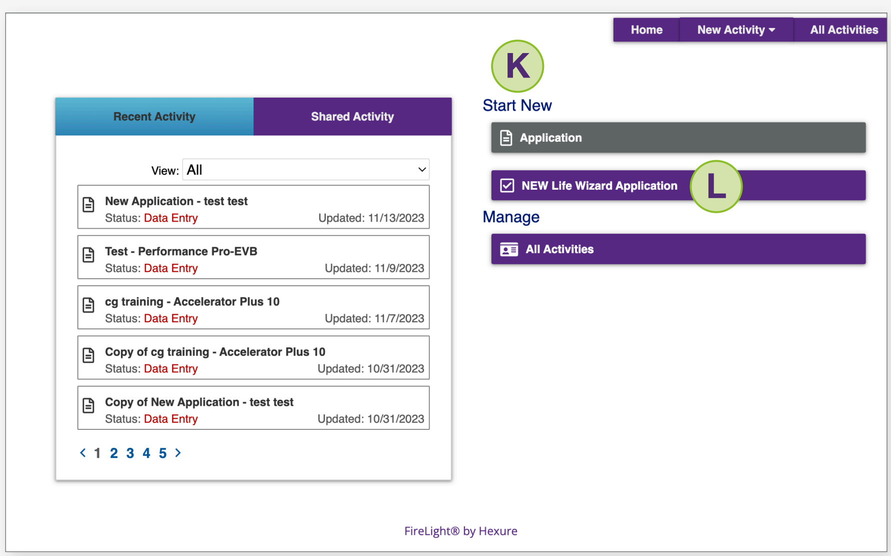


Online Applications

To the right of **F&G Life Products**, choose the appropriate agent ID for the application J, then click **Select** to access FireLight e-App (our vendor for online applications).

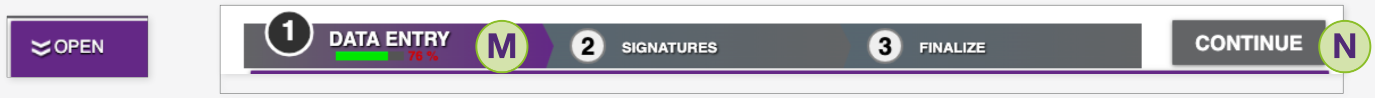
In FireLight under **Start New** K, click **New Life Wizard Application** L and then follow the prompts. The client's last name usually works well for the name of the application.



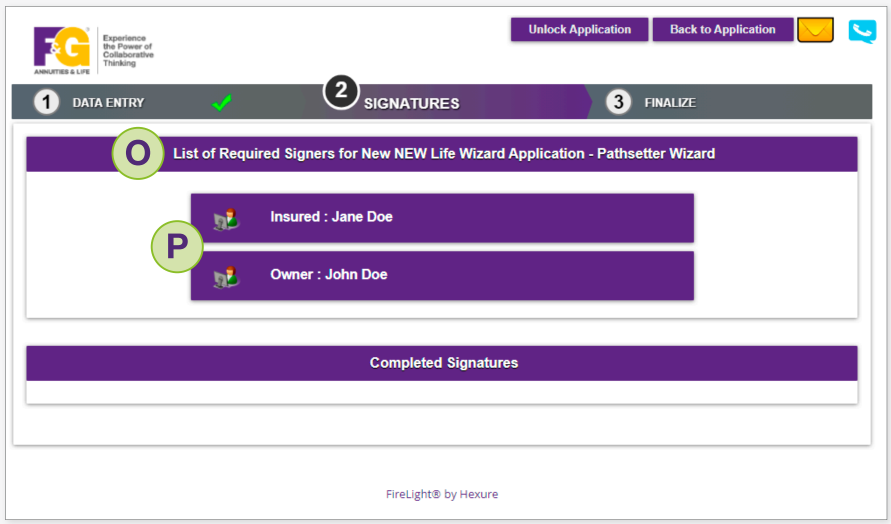


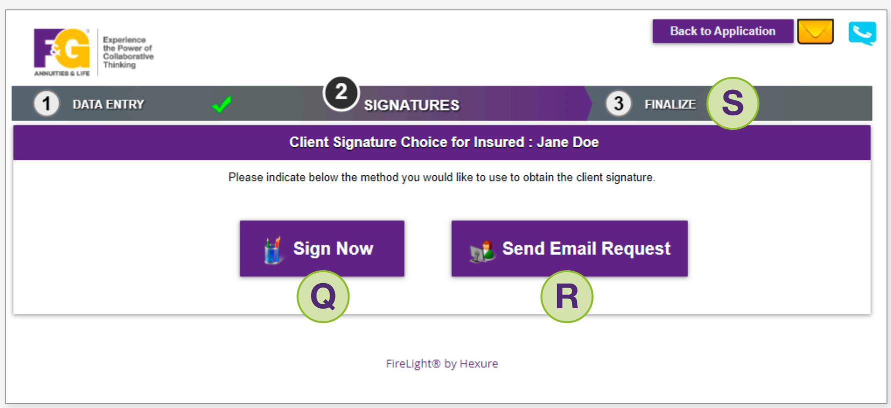
Additional tips for using the Wizard e-App

- You can check with F&G’s Contracting team (800.445.6758, option 4) to make sure you’re appointed in the clients’ resident state.
- Answer all questions until you reach 100% completion under data entry. Use the **Open** tab or select the percentage complete M to jump to incomplete sections of the application.



- Once complete, you’re ready to have the client sign electronically—either in person or via email. Click **Continue** N in the upper right-hand corner, and then click **Use E-Signature.**
- Once you’re on the List of Required Signers for New Application page O, select the appropriate signer types P and then click Proceed. Click **Sign Now** Q if the client will be signing in person or **Send Email Request** R.
- If the applicant represents more than one signer type, select each suitable signer type (e.g., if the client is the owner, payor and insured, then select all three). For non-resident sales, the client must electronically sign the application in their state of residence. We do allow you, as the agent, to be located in a different state.
- Once the client has signed, you’ll receive an email notification. Go back to e-App, and access the application under recent activity. Follow the prompts to sign the application as the agent and finalize the application S for submission.



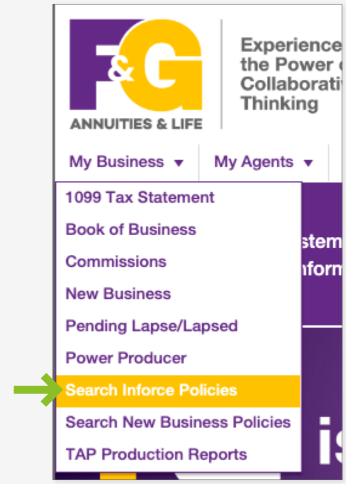


Find information on your inforce policies

To start, hover over the SalesLink tab titled **My Business**, then select **Search Inforce Policies** to go to the overview page. There, you can:

- Search by owner, insured or corporation name.
- Look up cases by policy number.

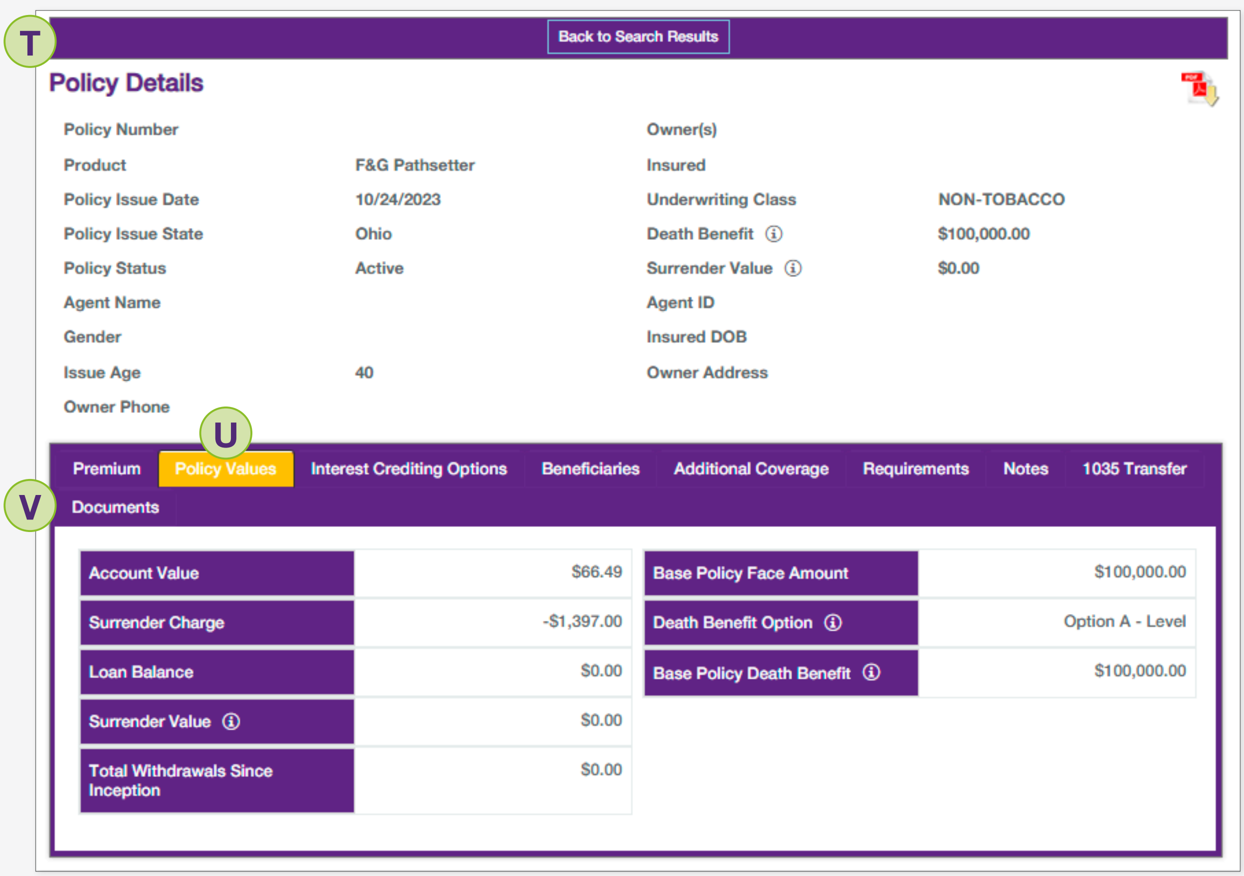
Click on the specific policy number you're interested in exploring, and you'll see a screen that looks like the screenshot below T.



Policy Details

On the Policy Details screen, you can navigate among the tabs U (Premium, Policy Values, Interest Crediting Options, Beneficiaries, etc.) to see information for each.

You can also print documents such as annual statements, policy pages or reallocation letters by clicking on each under Document type V. Some documents may not be available online.



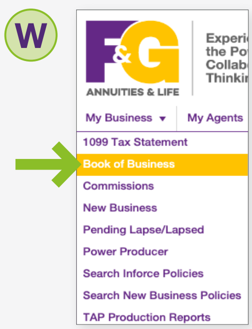
Book of Business

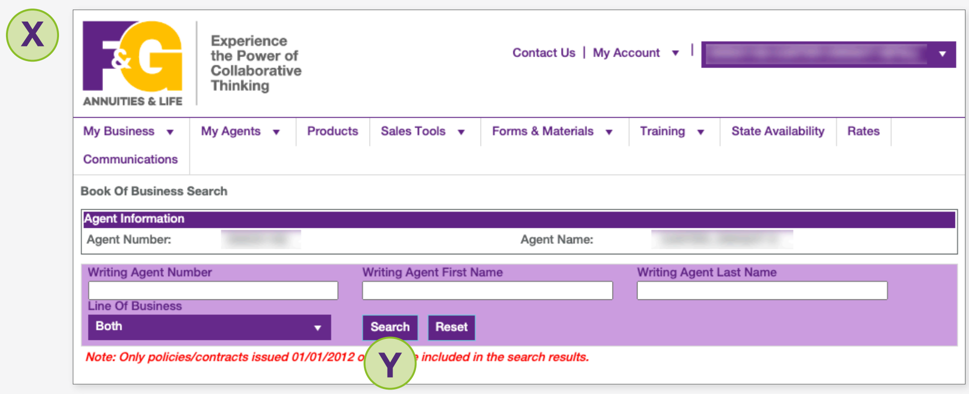
You can now access your personal book of business via SalesLink.

Back on the home page, hover over **My Business** and click **Book of Business** W. From there, you'll see the screen shown below X.

Simply enter your agent ID or policy number and click **Search** Y. An online view of your report will appear. To download the full report (including additional details) into Excel, click the **Download to Excel** button.

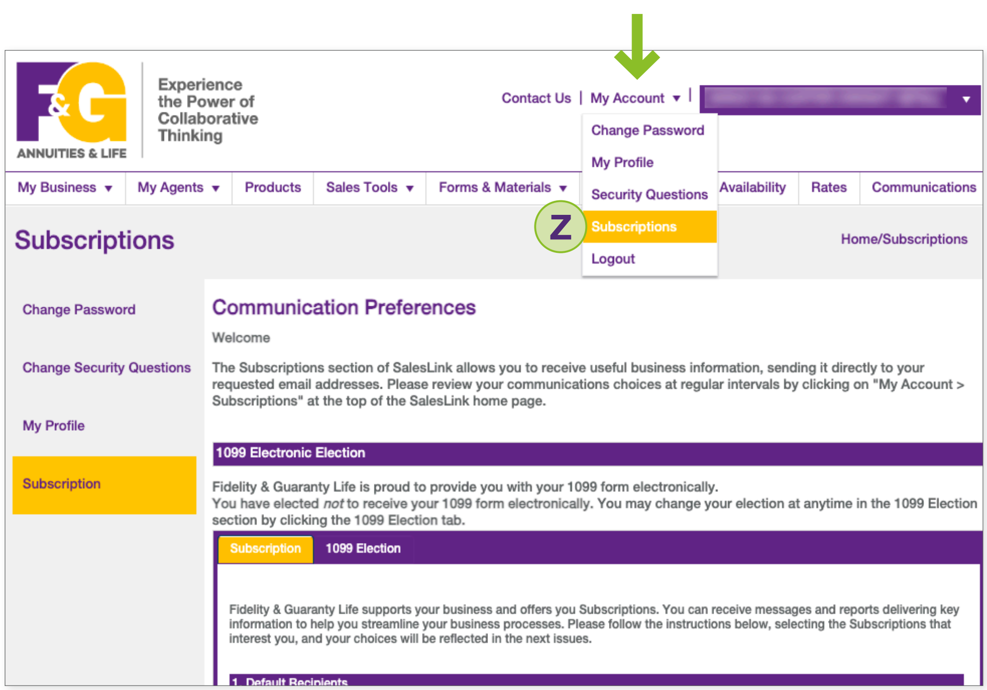
> **PLEASE NOTE:** Policies are shown by agent ID, so if you have more than one, you'll need to switch between them in the upper-right. Policies issued prior to 2012 are not available online.





Track your business with help from Subscriptions

To get started, hover over **My Account**, then click **Subscriptions** Z. Scroll to the bottom of the page. Select the event that you would like to receive as an email notification. Finally, make sure you click **Update Subscriptions** at the bottom of the page. On the next page we've listed the most popular subscription options.



For financial professional use only. Not for use with the general public.
Fidelity & Guaranty Life Insurance Company

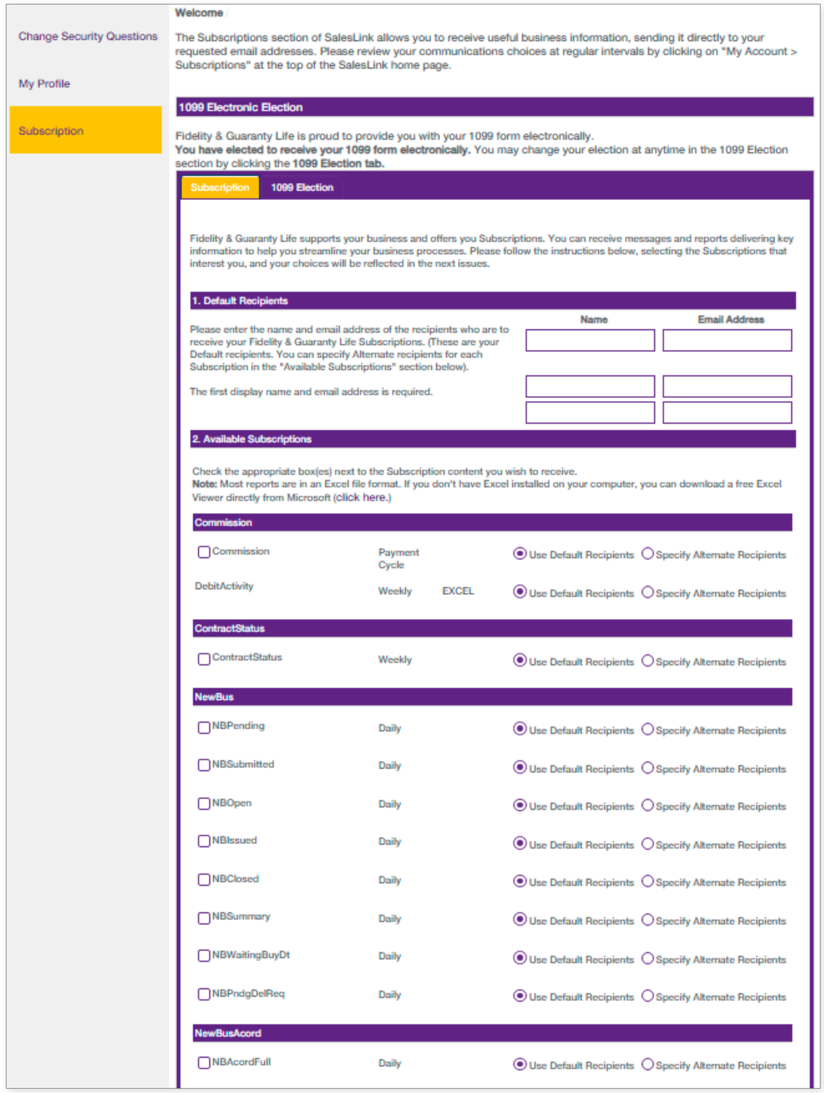
ADV5503 (10-2024)
24-1279

Reports

- Agents receive an email with links to daily reports on New Business items including Pending, Submitted, Open & Closed cases, Waiting Buy Date and Pending Deliver Requirements and Pending Lapse.

Reports on Commissions, Contract Status and Total Annualized Production are available weekly.

The screenshot to the right shows the full list of reports as it appears in SalesLink.



eTrack

Writing or servicing agents receive individual email notifications when an event occurs on a policy in which they're listed. Emails include a brief description of the event and a direct link to take action on SalesLink.

Notifications are available for:

- **Application status -** Submitted, Issued/Paid, Closed/Cancelled, Conditionally Issued
- **Requirement information -** New requirement requested and requirement information received
- **1035 exchange information -** Requested and received, when a new note is added or when an existing 1035 is received.

Agency Integrator

Finally, Agency Integrator reports occur daily and provide advanced insight into new business processing cycles, sales pipelines, commission reconciliation and more.

Current users of Agency Integrator can request F&G data feeds by contacting us at FGRelationshipManagement@fglife.com.

What else can SalesLink help me do?

The previous pages covered the activities you'll use SalesLink for most often. We also have tips and tricks for taking advantage of the rest of the site's features.

Commissions

Hover over **My Business**, click **Commissions**, and you'll have access to a deep well of information on your commissions, including current and historical commissions statements and details on the hierarchy down to the individual policy.

So deep, in fact, that we've created a standalone commissions piece to help you understand everything that's available to you and what the terminology means.

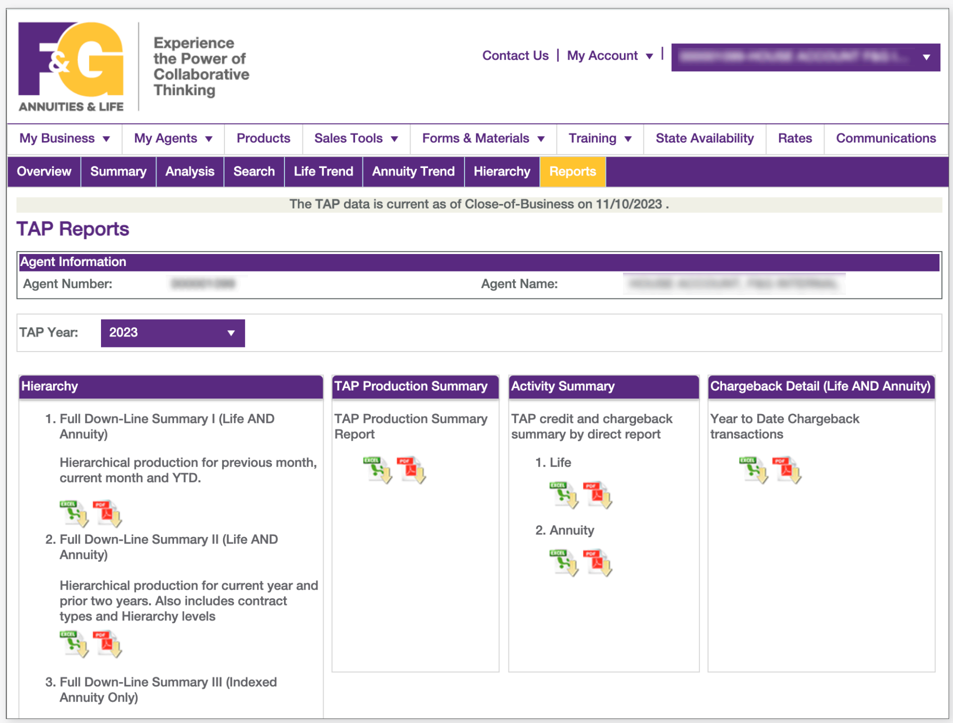
What if my commissions aren't here?

You'll only see commission information on SalesLink if your commissions are paid directly by F&G. If you have your commissions paid through your personal agency code, you will need to be logged in under that code to see details (i.e. not logged in under the code you use to write business). If you receive commissions from your marketing organization (not directly from F&G), please contact them for support.

TAP Production Reports

Hover over **My Business**, click **TAP Production Reports**, and you'll be able to explore past production as well as your year-to-date business and that of any of your downlines.

- The Life and Annuity Trend report can be run by selecting a year. It can be downloaded as an Excel or PDF file.
- Trend analysis displays the top five direct reports, top five writing agents, top five plans and top five products.
- Hierarchy reports list your current hierarchy and provide production broken down by line of business and different time frames.
- Activity Summary reports provide a summary of credit vs. chargebacks for your direct downlines.



**We're here to help you with any SalesLink questions you have.
Call us today at 800.445.6758 for more information.**

"F&G" is the marketing name for Fidelity & Guaranty Life Insurance Company issuing insurance in the United States outside of New York. Life insurance and annuities issued by Fidelity & Guaranty Life Insurance Company, Des Moines, IA.