

American General Life Companies

Market Synergy Group (MSG) Product

How to setup your carrier schedules:

- Go to your Agency Setup page
- Select the Carrier Tab
- Select "American General Life Companies" from the carrier list
- You now have two tabs that indicate "Normal" and "MSG". You'll want to ensure BOTH are selected.

Relationship for American General Life Companies

Schedule: Default [Add Schedule] [Rename] [Remove] [Download forms]

Agency Code: [Set Affiliation] FMO Enabled:

Normal MSG

Commissions [Add] Hierarchy [Strict]

For each schedule you already have setup, you'll now be able to pre-set Hierarchy and Compensation data for both your Normal AG schedule and your MSG schedule, each separately.

- Select a schedule to modify
- Click on the "Normal" Tab to adjust settings to your Normal/Standard schedule.

Relationship for American General Life Companies

Schedule: Default [Add Schedule] [Rename] [Remove] [Download forms]

Agency Code: [Set Affiliation] FMO Enabled:

Normal MSG

Commissions [Add] Hierarchy [Strict]

01 Direct Upline Agent Code: (TIN if pending)

Name Morton Financial Group
Code AG111

02 Independent Wholesaler (IW) Code: (if applicable)

Name
Code

03 Submitting Agency:

Name Morton Financial Group
Code AG111

Company Name and Code listed for the Standard/Normal American General contract

Life Products: 1st YR Level (Required)
C [Add] [Remove]

Life Products: Renewal Level (Required)
C [Add] [Remove]

Specialty Products: First Year / Renewal Level
[Add] [Remove]

AGL Annuity: First Year / Renewal Level
C [Add] [Remove]

A&H: First Year Level
[Add] [Remove]

A&H: Renewal Level
[Add] [Remove]

Productivity Override (HO Approval)
[Add] [Remove]

Productivity Bonus (HO Approval)
[Add] [Remove]

- Click on the "MSG" Tab to adjust settings to your MSG schedule.

Relationship for American General Life Companies

Schedule: Default

Agency Code: FMO Enabled:

Normal **MSG**

Commissions

Life Products: 1st YR Level (Required)

Life Products: Renewal Level (Required)

Specialty Products: First Year / Renewal Level

AGL Annuity: First Year / Renewal Level

A&H: First Year Level

A&H: Renewal Level

Productivity Override (HO Approval)

Productivity Bonus (HO Approval)

Hierarchy Strict

01 Direct Upline Agent Code: (TIN if pending)

Name

Code

02 Independent Wholesaler (IW) Code: (if applicable)

Name

Code

03 Submitting Agency:

Name

Code

As Applicable

Company Name and Code listed for MSG contracts

- Repeat this for each schedule you have setup.

Please note that although you are setting up both Normal and MSG schedules, you will have an opportunity to de-select one or the other when you process an agent's contract request.

How to process a contract request:

- Go to Info & Appointments
- Search your Producer
- Open the contract request for "American General Life Companies"
- Step 1 - Select Carrier and Request Type
- Step 2 - Select State(s) and Product(s) selections.
- Step 3 - Answer any carrier specific questions.
- Step 4 - Select the carrier schedule needed from the Schedule drop-down menu. Please note if you only have 1 schedule created, no drop-down menu will be visible, the system will simply show your Default schedule.

Within Step 4, be sure to indicate by selecting the appropriate checkbox(es) for the desired product line(s) [see screenshot below]. Selecting BOTH "Normal" and "MSG" will ensure the hierarchy settings are applied separately to each request. Likewise each contract will be electronically submitted to their respective divisions at the carrier.

Home Appointment Request ROBERT BRIAN MORTON/ Compens... Previous Next

Schedule: Default

Normal MSG

Commissions

Life Products: 1st YR Level (Required)
C

Life Products: Renewal Level (Required)
C

Specialty Products: First Year / Renewal Level
[]

AGL Annuity: First Year / Renewal Level
C

A&H: First Year Level
[]

A&H: Renewal Level
[]

Productivity Override (HO Approval)
[]

Productivity Bonus (HO Approval)
[]

Specialty Code:
[]

Annuity Code:
[]

Hierarchy

Strict

01 Direct Upline Agent Code: (TIN if pending)
Name: Morton Financial Group
Code: AG111

02 Independent Wholesaler (IW) Code: (if applicable)
Name: []
Code: []

03 Submitting Agency:
Name: Morton Financial Group
Code: AG111

If you do not want/need to submit an MSG contract for a particular request, simply unselect the MSG checkbox in step 4 and only a Normal (aka Standard) contract will be processed and sent to the carrier electronically.

The Hierarchy and Compensation schedules in step 4 are completely modifiable just as any other contract request. Feel free to make any adjustments for one-off situations that differ from your pre-built schedules.

The last step of the contract process will include either "Normal", "MSG" or both sets of forms based on your selection in step 4.

All required forms will populate with a checkmark automatically selecting the forms the carrier has indicated are REQUIRED. Any forms unselected are OPTIONAL for you to select as needed.

Please ensure if you are processing both a "Normal" and an "MSG" contract that you select optional pages for each as needed. Forms prefaced with the word "Normal" will apply to your standard American General contract. Forms prefaced with "MSG" will apply to the MSG contract request.

Each will be electronically sent to the appropriate division at the carrier. There is no need to send anything manually.

Don't be alarmed if you only receive one merged.pdf from SureLC for both contract types. This is the normal and expected behavior so you have just one file for your records. Rest assured that American General is receiving everything as they requested it from SuranceBay.

Finally – you will receive an email from SuranceBay as you normally do each evening with assigned agent codes. Each assigned agent code(s) will be reflected accordingly on the email that you receive so that you know the assigned agent code(s) for each product line.