APEXA

SIMPLY CONNECTED

APEXA ADVISOR AND CORPORATE ONBOARDING STRATEGY

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Question #1:

- Is the note section of In-trust only visible if you have direct relationships? Can Carriers see whether an MGA has invited an Advisor in this section?

Answer:

- The *Notes* section will be available on any In-Trust record for your Advisors and Corporations. It only includes information if your company has sent invitations. For example, if a Carrier sends invitations mostly to its MGAs, and the MGAs are inviting the Advisors, the Carrier will not be able to see the Advisor invite information on their In-Trust record. It will only show on the MGAs' In-Trust records.

Question #2:

- Assuming an Advisor already has an APEXA profile. If a Corporation requests an MGA contract on behalf of that Advisor and adds the e-mail associated to their profile, will this create a relationship between the Advisor and the Corporation automatically, or would the Advisor receive a notification to accept it first?

Answer:

- In a scenario where the Advisor already has an APEXA profile, the 2-party contract between Advisor and Corporation would need to be active BEFORE the Corporation can submit a contract request to an MGA on behalf of the Advisor.

Question #3:

- When is it acceptable for an Advisor to enter a personal (residential) address in place of a business one?

Answer:

- There are two scenarios when an Advisor would enter a residential address as a business address:
    1. The Advisor works from home – therefore their residential address(es) and business address(es) are the same.
    2. If the Advisor has been working less than 5 years, they will not have 5 full years of business address history. In this case, the Advisor should input their business address(es) for the time appropriate and then fill out the remainder of the 5 years of address history with their residential address(es).