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www.gilico.com

GILICO Contract Checklist

Items 1 – 8 Must Be Returned to GILICO

- 1. **Application for Appointment To Represent – Form GIA 136(Rev 1/10)**
 - ✓ The Producer and the Marketing Organization must sign the application.
- 2. **Consumer Credit Reporting Disclosure – Form GCCR-D (1/12)**
- 3. **Consumer Credit Reporting Authorization – Form GCCR-A (1/12)**
- 4. **Authorization for Automatic Commission Deposits – Form GI 508 (10/99)**
 - ✓ Please attach a “VOID” check for the account to which automatic deposits are to be made.
- 5. **Agent’s Contract – GI 129 (Rev 4/99)**
- 6. **Copy of Producer License**
 - ✓ LTC License requirements – Life and Health or Disability; North Carolina also requires a Med/Supp License
- 7. **Copies of LTC and/or Annuity Suitability Education Certificates of Completion. (If applicable, original and most recent follow-up training certificates)**
 - ✓ Annuity Suitability – See the “State Annuity Suitability Training Requirement List” at www.GILICOLink.com (User Id – download / Password – prq891) for your state’s training requirements. *Must be done prior to solicitation.*
 - ✓ LTC Continuing Education – See “State Long-Term Care Appointment Requirements” at www.GILICOLink.com (User Id – download / Password – prq891) for your state’s license and training requirements. *You must have the correct license and training prior to solicitation.*
 - ✓ GILICO Product Education – States requiring annuity suitability training also require company specific product training prior to solicitation of an annuity. The product training presentations and quizzes can be found on www.GILICOLink.com (User Id – download / Password – prq891). GILICO tracks completion of this education so certificate copies need not be submitted. *Note: You must complete Annuicare® and FlexPlus training before soliciting Annuicare® 10, 7 or 5. You must complete Annuicare® and Guaranty training before soliciting Annuicare® 8, 6 or 4.*
- 8. **Request for Taxpayer Identification Number and Certification – Form W-9**
- 9. **Agent’s Guide Rules and Procedures & Anti-Money Laundering Producer Guide – (4/28/06)**
 - ✓ **Do not return.** These should be kept by the producer.