

MGA Information in EZcomplete

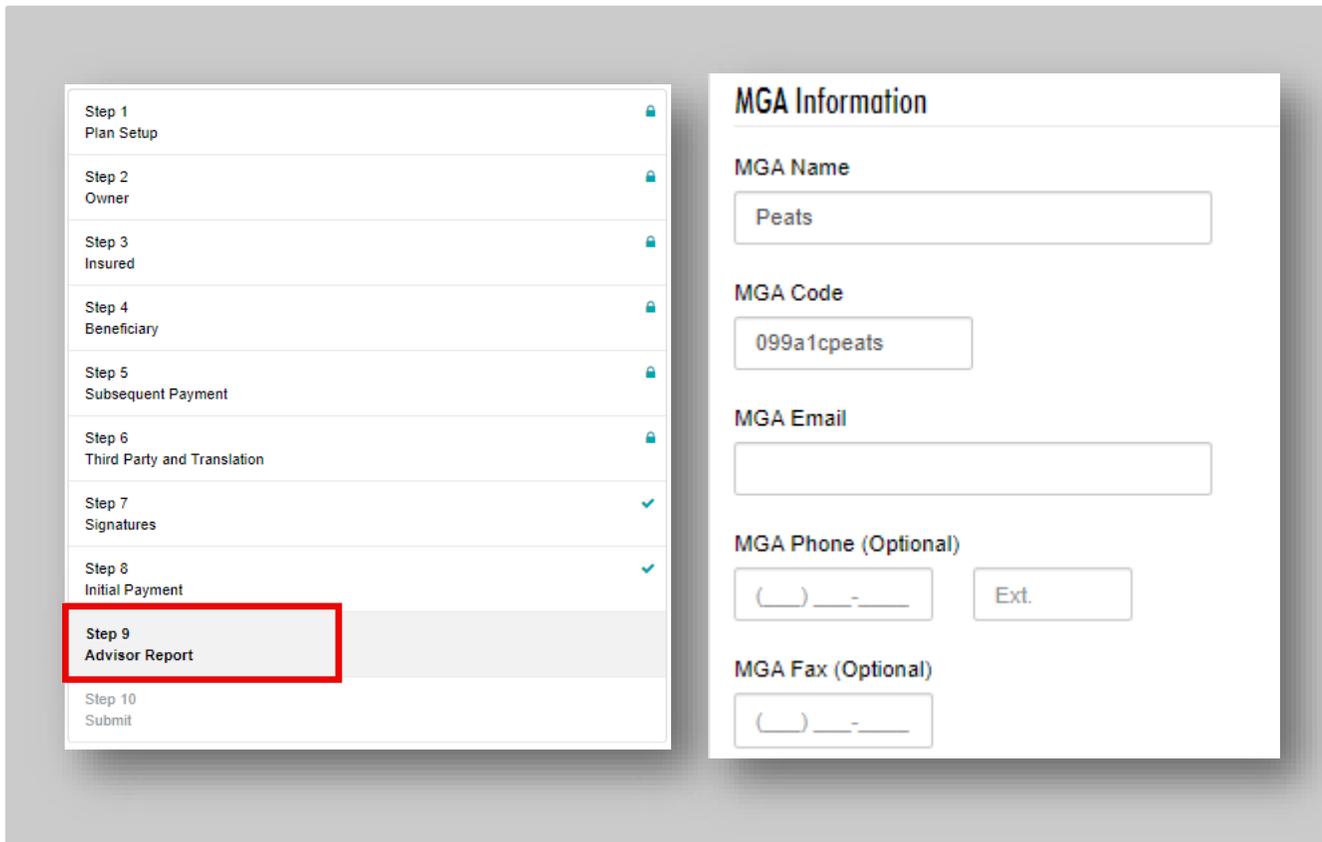
This document will guide you through how to add or update a MGA when completing an application in EZcomplete.

Once the application has been signed, the Advisor will be navigated to Step 9 the Advisor Report.

In this is the section, the Advisor will add the MGA information.

Once the information is entered it is automatically saved for all future applications.

The inputted MGA information does not need to be re-entered when completing an application. However, if the Advisor moves to a different MGA, it is then up to the Advisor to update the MGA information in Step 9 on the Advisor Report.



The screenshot displays the EZcomplete application interface. On the left is a vertical sidebar with a list of steps: Step 1 Plan Setup, Step 2 Owner, Step 3 Insured, Step 4 Beneficiary, Step 5 Subsequent Payment, Step 6 Third Party and Translation, Step 7 Signatures, Step 8 Initial Payment, Step 9 Advisor Report (highlighted with a red box), and Step 10 Submit. On the right is the 'MGA Information' form, which includes the following fields: MGA Name (Peats), MGA Code (099a1cpeats), MGA Email, MGA Phone (Optional) with separate boxes for area code and extension, and MGA Fax (Optional) with a box for area code and extension.