



SEQUOIA INNOVATIONS

Your Legacy, Your Family Tree

Get Started With Sequoia Innovations

Step 1: Fill up New Associate Form

Download the form at <https://www.sequoiainnovations.com/agent-resources>

Submit completed New Associate Form to info@sequoiainnovations.com

Step 2: Complete Training Sales (minimum of 4 sales)

Download Training Sales Transmittal Form (TSTF) at
<https://www.sequoiainnovations.com/agent-resources>

Submit completed TSTF to info@sequoiainnovations.com

It is your responsibility to get as much training as possible BEFORE you pass your state exam. Because once you're licensed the field trainer has other unlicensed team members to train.

Step 3: Sign up for Life Insurance Pre-licensing School

CALIFORNIA PRE-LICENSING

Go to sequoiainnovations.com, Select the "Agents" tab and click on "Licensing" and follow instructions.

<https://www.sequoiainnovations.com/licensing>

Step 4: Schedule and take License Examination

Once the 32 hour pre-licensing course has been completed, schedule your State exam.

Download "How to schedule Life Insurance Exam" for instructions and also schedule your state exam at sequoiainnovations.com on "Licensing" page. Create a free account on PSI website and when scheduling, select the exam: **CA CDI Site – Life Only Exam**. You will have the option to take the exam at the test center or remote online proctored (from home)

<https://www.sequoiainnovations.com/licensing>

Step 5: Get Fingerprinted

Once you pass the life exam, the state requires fingerprinting.

Make sure you fill out “Fingerprinting Form” (442-39A) and bring with you to the vendor site. You can find a copy of the form at [sequoiainnovations.com](https://www.sequoiainnovations.com) under the “Licensing” page.

<https://www.sequoiainnovations.com/licensing>

Next, find a Live Scan Vendor from the “Fingerprinting Vendor List” at [sequoiainnovations.com](https://www.sequoiainnovations.com) on “Licensing” page. <https://www.sequoiainnovations.com/licensing>

Step 6: Apply for State License

After passing the license examination, go to [sircon.com](https://www.sircon.com) to submit an electronic license application. If documents are required, please attach those documents to the electronic license application.

<https://www.sircon.com/landingPages/states/california/content.jsp>

If asked for a 12 digit identification number:

*The 12 digit California ID number consists of the last four digits of your social security number (e.g. ####) followed by your birth date (e.g. (mmddyyyy)). This information reflects the PSI registration information that you submitted to PSI to schedule the license examination. Please ensure that the last four digits of your SSN and your birthdate listed in the California ID are correct. If the information is incorrect, you will not be able to submit your license application. Please contact CDI at (800) 967-9331 for instructions on how to submit your license application.

- **IMPORTANT:** If you took the LIFE ONLY TEST (80 questions), select LO (LIFE-ONLY AGENT) for license type.
- Proceed by filling out the application with your info. When asked to fill out the last 5 years of work history, make sure to fill up all 5 years. Do not leave any gaps. Even if you were unemployed or a homemaker, they want to know what you were doing in the last 5 years.
- **NOTE:** when asked about if you wish to be variable licensed or if you are associated with any variable or financial co, your answer should be “NO”. If asked for CDR number, put N/A. Those questions are in regards to being securities licensed.
- Make sure you leave a valid email address, because THAT IS WHERE THE STATE WILL BE EMAILING YOUR LICENSE INFO TO YOU. Also at that time, you will be paying the State Application Fee. The **non-refundable** fee collected when submitting is \$188 per license.

Step 7: Apply for Errors & Omissions

Errors & Omissions is a liability insurance that helps protect professional advice- and service-providing individuals and companies from bearing the full cost of defending against a negligence claim made by a client, and damages awarded in such a civil lawsuit. As a life insurance producer, it is mandatory for you to have an Errors & Omissions before getting appointed with insurance companies.

IMPORTANT: When purchasing E&O coverage select **Level IV coverage with fixed annuities.**

Please visit to obtain your Errors & Omissions: <http://calsurance.com> or napa-benefits.org

Step 8: Get Appointed with AIG

Once you've completed everything, please follow the steps below in order to complete an AIG and Sequoia Application.

1. Download the AIG-Sequoia Packet at <https://www.sequoiainnovations.com/agent-resources>
2. Fill up the AIG Producer Appointment Packet.
3. Fill up the Sequoia Agent Agreement Form.
4. Fill up the W9 Form Attached in the packet.
5. Fill up the Electronic Fund Transfer form in order to receive your commissions.
6. Attach a copy of your voided check with your printed name on it. (The company will not accept voided checks without your printed name on it).
7. Fill up the Sequoia Business Mailing Agreement.
8. Fill up and submit the 4 training sales transmittal form.
9. Attach a copy of your resident license.
10. Attach a copy of your Errors and Omissions.

Step 9: Getting Started as a Producer

1. Set up your AIG Connex Account

Once you've received your Producer Service Number in your email, follow the instructions enclosed in that e-mail and set-up your account. <https://live.cloud.api.aig.com/life/connex-portal/public/registeruser>

2. Mandatory AIG Campus Courses (under the "Resources" tab)

Before you can officially submit business, there are two required courses for you to take in AIG Campus

- ABR Training Certification (CA Only)
- Anti-Money Laundering

3. Other AIG Campus Courses

It is important to complete the AIG Partners Group – Recommended Training.

If you have any questions about the procedures, please feel free to contact your direct manager, or the Sequoia Home office. Contact information is provided below:

Home Office	E-mail Address
Telephone #: (818)-507-0980 2700 Colorado Blvd. Suite 101 Los Angeles CA, 90041	info@sequoiainnovations.com