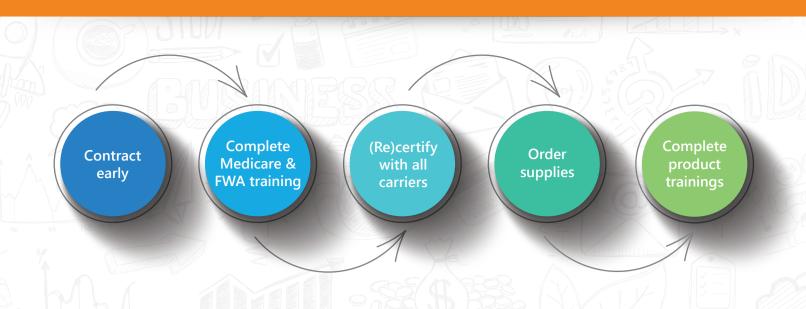
AEP/Ready-to-Sell Checklist





CONTRACT EARLY

June – early July

WHY

The turnaround time for processing contracts increases as AEP approaches. Before the late-summer rush, we can typically process contracts in three days. During our busy season, processing contracts takes closer to five to seven days.

HOW

We provide agents with 24/7 online access to appoint with top carriers. Here's how to submit a new contract:

- 1. Log in to App.RitterIM.com and go to Contract Now.* 2. Select your desired carrier, then choose your state(s) and product.
- **3.** Follow the simple prompts to complete the form.

4. When you get to the last page, sign twice at the bottom, then hit

- the green **Continue** button. 5. A PDF will immediately be created for download. You'll receive a
- copy via email as well. 6. Print any pages that require your signature and sign them.
- 7. Send the completed contract to Ritter via fax (888-509-7058) or
- email (license@ritterim.com).

*Newly registered agents must speak with their sales specialist to unlock **Contract Now**.



MEDICARE & FWA TRAINING

COMPLETE AHIP

Starting Mid-June

WHY

complete certain certification trainings every year. (Most carriers don't require Medicare Supplement agents to complete certifications.) Medicare and Fraud, Waste and Abuse (FWA) training covers the basics of Medicare, CMS guidelines, plan options, marketing, enrollment requirements, and FWA.

Acceptable Medicare and FWA training is usually offered by third

If you wish to sell Medicare Advantage and Part D plans, you must

HOW

parties, like <u>AHIP</u> and <u>NABIP</u>. Before choosing a training provider, check which ones your carriers accept. Consider their cost, percent needed to pass, and continuing education credits.



(RE)CERTIFY WITH ALL CARRIERS

July

WHY

products through the end of the year after receiving your upcoming plan year's certification. Visit each carrier's agent portal to complete certification. To simplify the process, we compile an all-in-one list of requirements in our

Agents must successfully complete market-specific training for every

HOW

<u>Certification Center</u> each year. We also send emails throughout the summer to let you know when new certifications are available.



RDER SUPPLIES

start enrolling on October 15.

CMS doesn't allow carriers to send sales materials out prior to October 1. However, you'll want to get your orders in early to make sure you can

Within 24 to 48 hours of

completing certifications

HOW

instructions on ordering.

desired carrier and click on **Supplies** in the gray menu to the right for

Log in to **RitterIM.com**; then, visit **our Carriers page**. Select the



Going into AEP knowing which plans you will offer – and which products

COMPLETE PRODUCT TRAININGS

August

to October

HOW

webinar. Ritter's Summits are a great opportunity to complete these

agent portal or contacting that carrier for full requirements.

Remember, Ritter is here to help you succeed! If you have questions or need help with anything, don't hesitate to reach out to us.







