

Team Builder Contracting Cheat Sheet

Use this quick reference guide to help you onboard and contract new agents smoothly. Whether you're working with a brand-new recruit or a seasoned pro switching uplines, the info below keeps things clear and compliant.

Release Requirements

- Agents coming from another IMO may need a formal release depending on the carrier.
- If the agent hasn't written business in 6+ months, some carriers may waive the release.
- Always ask if they've been contracted with the same carrier in the past 12 months.
- If a release is needed, Legacy can assist with the request process.

SureLC & Contracting Access

- Contracting is handled through SureLC (SuranceBay).
- Legacy will provide the agent with their SureLC link once the onboarding request is submitted.
- Agents must have current E&O and AML training uploaded in SureLC to proceed. Both can be obtained through Surance Bay if necessary.

Carrier Assignment

- By default, downline agents receive the same carrier access as the Managing Agent.
- If you want specific carriers removed or added, include that in the onboarding request.
- Some carriers may require additional forms or interviews — Legacy will notify you if needed.
- In your email, please specify the override you'd like to earn on your downline's business — such as 10%, 15%, 20%, or more. This percentage will represent your commission spread and must be approved by the carrier during the assignment process.

Support & Help

- Email partners@legacyagents.com with any questions.
- Subject: Contracting Help – [Agent Name]
- For escalations, include any relevant documents (e.g., old contracts, release letters).