



Always there for you.

Online Contracting Instructions

Contracting Made Easy

If you have all your information in front of you, such as

- Social Security Number
- E&O Declaration Page
- Voided Check
- Date Anti-Money Laundering Was Taken & the Provider
- Legal explanations, if necessary,
- Annuity Training Certificates

This process should only take about 20 minutes

- Log on to www.callums.com
 - ◇ On the homepage ³/₄ down you will see Not Contracted? Start Here.
 - ◇ Click on Get Contracted.
 - ◇ Click **“Our Contracting System”**. Click on **New User?** At this point you will follow the prompts to establish your own User ID, Password and PIN #.
Then click “Add Me”
 - ◇ The goal is to change all of the red explanation marks, on the bottom tabs, into green check marks. Once you have all green check marks along the bottom tabs, you can choose the carrier that you would like to get appointed with.
- You are now able to upload all of your documents, such as your E&O, voided check and training certificates by click on the “upload forms” file. You are able to use your mouse to sign your name where it says “Online Signature.”

IMPORTANT:

- Contracting is **NOT COMPLETED** until it is extracted from the website by UMS personnel and submitted to the carrier(s) for processing.
- Contracting cannot be extracted unless you, the agent, **complete all steps and upload all necessary documents.**

Please select only the carriers for which you have business or intended business. The more carriers you choose, the longer the process.

FYI - Your information and signature will be imported onto the contract(s), and your documents will print with the contracts when extracted. UMS personnel will be notified of your contract request and contact you to discuss the carriers you have chosen. **The carriers can take up to 3 weeks for processing.** You will be notified either by UMS or the carrier when your contract(s) are active.

Should you have any questions please do not hesitate to call UMS at 800-524-1774.