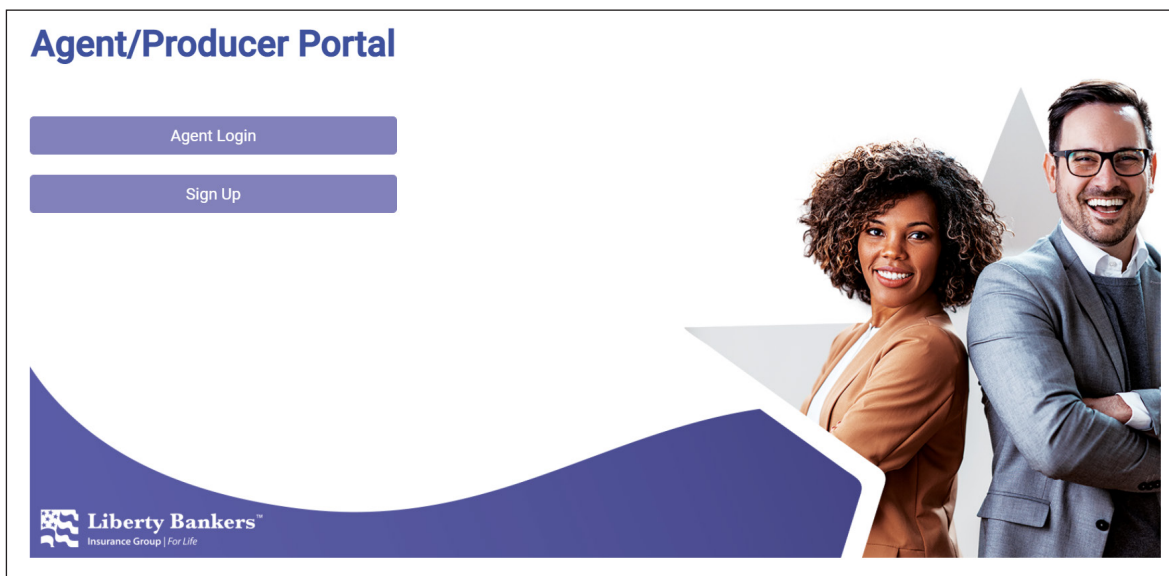


Agent Portal Quick Reference Guide

With Liberty Bankers Insurance Group's (LBIG) Agent Portal, you have access to relevant information, resources, and reporting that you need to manage your LBIG book of business.

GETTING STARTED



Step 1: Account Setup

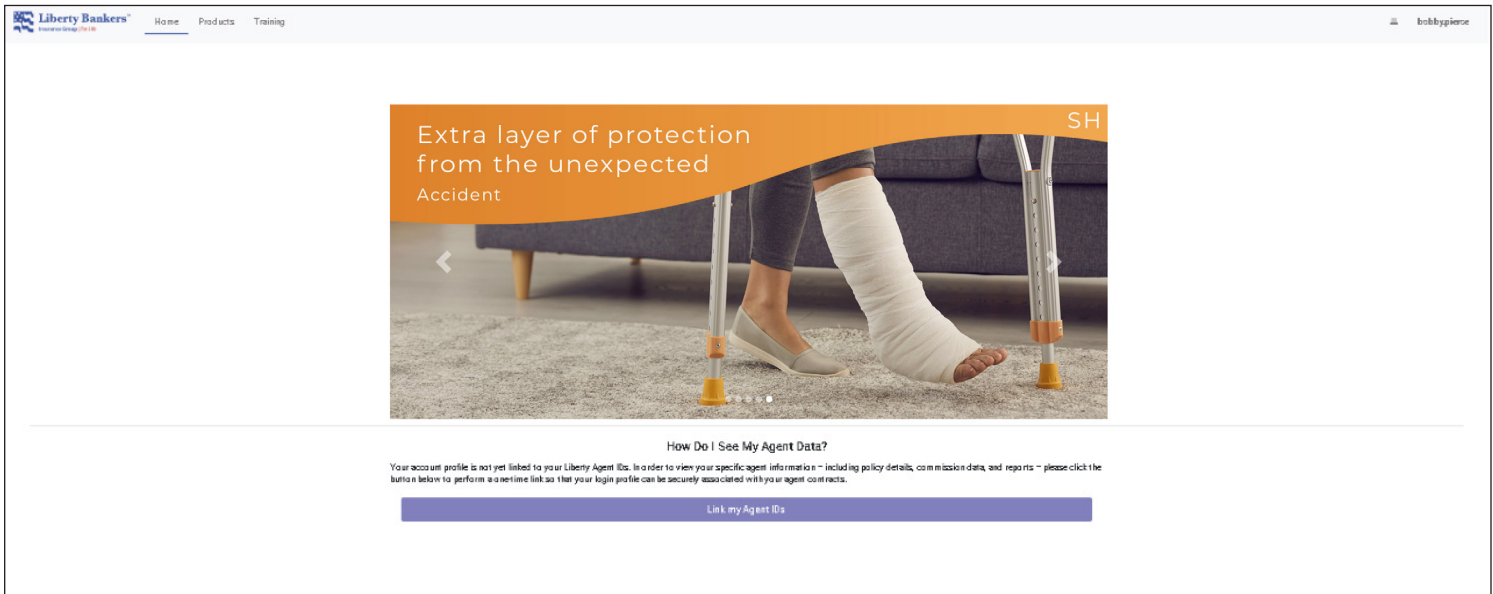
1. Visit <https://agent.lbig.com>
2. Click **Sign Up**
3. Enter your email address
4. Create and enter a new password (must be at least 12 characters)
5. Click **Continue**

A screenshot of the "Welcome" screen for the LBIG Agent Portal sign-up process. The screen is white with a black border. At the top is the Liberty Bankers Insurance Group logo. Below it is the text "Welcome" and "Sign Up to Liberty Bankers Insurance Group to continue to LBIG Agent Portal." There are two input fields: "Email address" and "Password". The "Password" field has a toggle icon (an eye) to the right. Below the input fields is a blue "Continue" button. At the bottom, there is a link: "Already have an account? [Log in](#)".

Step 2: Link My Agent IDs

To view specific agent information – including policy details, commission data, and reports – you will need to link your account to your Liberty Agent IDs. By linking your Agent IDs, your profile will be securely associated with your agent contracts.

- 1. Click **Link My Agent IDs**




- 2. Enter your Date of Birth, Last 4 Digits of your Social Security number or Federal Tax ID, and your Agent ID.
- 3. Click **Verify My Agent ID**.

If you are unable to verify your account, contact your LBIG team at 214-245-5292.

A screenshot of the 'Link my Agent IDs' form. The title is 'Link my Agent IDs'. Below the title is a paragraph: 'In order to securely associate your agent contracts to your login account, we need to ask you for three details related to one of your Agent IDs that have been assigned to you during the contracting process. Please enter the data below and use any one of your Agent IDs that we have assigned to you so we can safely verify you in our systems.' There are three input fields: 'DOB' with a placeholder 'date of birth --/--', 'Last 4 of SSN or EIN' with a placeholder 'last 4 digits of ssn or ein', and 'Agent Number' with a placeholder 'your agent number'. At the bottom are two buttons: 'Verify My Agent ID' (purple) and 'Cancel' (grey).

SITE OVERVIEW

My Briefcase



[Home](#) [My Briefcase](#) [Products](#) [Forms](#) [Training](#) [E-App](#) [Contact Us](#)

Ordinary Life

maremia@lbig.com

Performance

Policy Lookup

Docs & Tools


Reports

Statements

Agent Info

Agent: CLL22236SP


Key Performance Indicators



13 Month Projected Persistency

00.0%


Business Written By You & Your Downline



Year-to-Date Net Issued Production

\$418,427


Current Year: 2022



Persistency Incentive Level

Gold


Set Quarterly



Agent Trip Points

0


To Go: 75,000



Last Deposit Total Amount


\$49.91 / 2022-09-05

Total Commissions / Payment Date




Policies Charged Back

0



Lapsed/Not Taken In Prior Six Months


0



Submitted Apps

0 / 5

MTD / YTD




Policies Pending First Payment

0

- Performance – View Key Performance Indicators relative to your business. Click on the buttons for detailed reporting.
- Policy Lookup – Search for policy information and filter by issued, submitted, not taken, lapsed, pending, and past due.
- Docs & Tools – Access important resources and documents including supplies, print materials and rate calculators.
- Reports – View standard reports including Agent Balances, Child Rider Expiry, Issued Policies, Lapsed Reports, and more.
- Statements – Search for current and previous commission statements.
- Agent Info – View agent details, including downline agents.

Products

- LBIG Overview – Learn about LBIG’s entire product suite.
- Ordinary Life – Review product details for the Ordinary Life product portfolio.




[Home](#) [My Briefcase](#) [Products](#) [Forms](#) [Training](#) [E-App](#) [Contact Us](#)

Ordinary Life

maremia@lbig.com

LBIG Overview

Ordinary Life




Retirement

Annuity

With flexible payment and withdrawal options, you can rest assured that there's an annuity that can work for your client's needs.

Get Contracted



Health

Medicare Supplement


Health insurance that helps supplement original Medicare.

Get Contracted

Supplemental Health

Discover plans that protect your family.

Get Contracted



Life

Home Service

Allows your clients to pay their premiums in person so they are covered for those end-of-life costs with a single, lump sum, cash benefit.

Get Contracted

Ordinary Life

Life insurance specially designed to cover end-of-life costs with a single, lump sum, cash benefit.

Get Contracted

Pre-Need

Make all funeral decisions ahead of time – and also choose whether to pay an inflation-proof fixed rate, so the cost doesn't go up with inflation.

Get Contracted

Forms

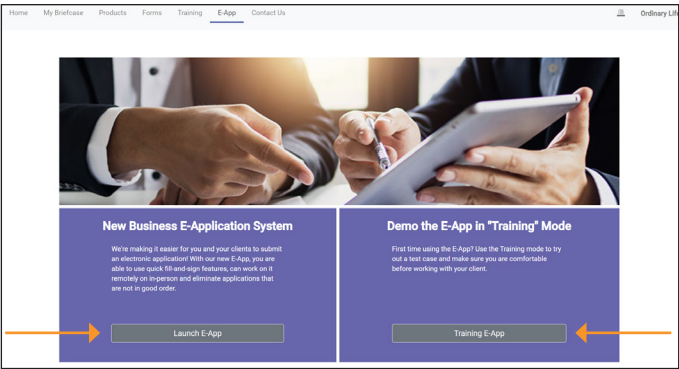
- Search, download, and email commonly used forms. Filter by state, form class, form type, and product.

Training

- LBIG Overview – Learn about LBIG.
- Ordinary Life – View agent training materials and how-to guides.

E-App

- Access the New Business E-Application System or demo the E-App in “Training” Mode.

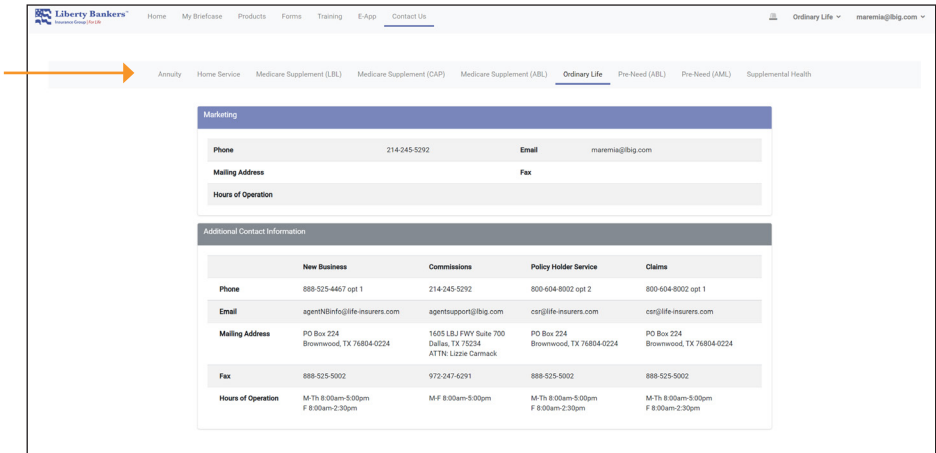


Contact Us

- Lookup the contact information for all LBIG’s lines of business.

Contact the LBIG team to learn more.

214-245-5292
agentsupport@lbig.com
https://agent.lbig.com



Liberty BankersTM
Insurance Group | *For Life*