

Distributor User Setup Form

The NIC Distributor App provides you with opportunities for multiple Distributor users to access your in force book of business, your Agents and your Policy Owners. The Distributor App supports different types of users with various capabilities from Agent and Client support to sales and marketing.

Complete this form with your user information so that we can get them set up on the Distributor App and please note the data access rules associated with each type of user. Also note that only the Super User and Ambassador User are required, the other users are optional. Users can be added and changed at any time.

Once you have completed this form please return it to us at distributor.onboarding@ins-connect.com .

NIC will add these users to the Distributor App and send out email invitations to each user.

1. Super User (required)

Your Super User should have an in-depth understanding of your organization, your operational hierarchy, your staff and your Agent network. Your Super User(s) will be able to do the following:

- Ability to add, edit, and delete your users including their data access
- Ability to add, edit, and delete content on the platform
- Manage your hierarchy, adding, editing and deleting offices, users and Agents
- Access all your offices, Agents, Policy Owners and policy data

* Indicates required fields

FIRST NAME	LAST NAME	E-MAIL	PHONE NUMBER

2. Distributor Ambassador User (required)

Your Activate Program subscription does not include the ability to communicate and share content or documents with your Agents. This functionality is included in the Engage Program.

The Activate Program does however provide for a single Distributor Ambassador User who will have the ability to communicate with all your Agents on NIC. The Distributor Ambassador's profile will appear on the NIC Agent App and enable each Agent to communicate with the Ambassador.

* Indicates required fields

FIRST NAME	LAST NAME	E-MAIL	PHONE NUMBER

3. Distributor App Users (optional)

Your Activate Program subscription allows you to add either i) up to 20 NIC Distributor App users, or ii) an unlimited number of NIC Distributor App users. These users will typically include Marketing Staff, Agent Support Staff, and Sales Managers/Wholesalers who can all use NIC to grow and service your business.

Please identify your users and their access withing your hierarchy by completing and returning the sections below either now or at a future date.

Once we receive the list of users, we will contact each user directly to provide them with access to the NIC Distributor App. Unless you instruct us otherwise all Distributor App Users will be initially added at the top of your hierarchy (they will have access to all firms, Agents, Policy Owners and policies), once they are set up the Super User can adjust their access.

Sales Managers/Account Managers (optional)

Sales Manager/Account Manager users will have data access to all or some business units; as defined by the Super User. The Super User can edit their access using NICs hierarchy management tool.

* Indicates required fields

FIRST NAME *	LAST NAME*	E-MAIL*	MOBILE PHONE NUMBER	ACCESS IN HIERARCHY
<i>Daniel</i>	<i>Kirk</i>	<i>daniel@abcfinancial.com</i>	<i>232-555-8776</i>	<i>Daniel Kirk downline/region</i>

NOTE: Unless noted in the *Access in Hierarchy* column, all Distributor App Users will be initially added at the top of your hierarchy (they will have access to all firms, Agents, Policy Owners and policies), once they are set up the Super User can adjust their access.

Support User (optional)

Support Users will have access to your entire network including all Sales Managers, Regions, Offices, Agents, Policy Owners and policies.

FIRST NAME *	LAST NAME*	E-MAIL*	MOBILE PHONE NUMBER	ACCESS IN HIERARCHY
<i>Joe</i>	<i>Smith</i>	<i>joe@email.com</i>	<i>522-876-9876</i>	<i>Entire downline</i>

NOTE: Unless noted in the *Access in Hierarchy* column, all Distributor App Users will be initially added at the top of your hierarchy (they will have access to all firms, Agents, Policy Owners and policies), once they are set up the Super User can adjust their access.

Marketing Users (optional, Engage Program only)

Marketing Users will only have access if you have purchased the Engage Program. Marketing User will have access to your entire network including all Sales Mangers, Regions, Offices, Agents, policies and have the ability to manage content, send broadcasts, etc.

FIRST NAME *	LAST NAME*	E-MAIL*	MOBILE PHONE NUMBER	ACCESS IN HIERARCHY
<i>Mandy</i>	<i>Rogers</i>	<i>mrogers@email.com</i>	<i>613-998-6625</i>	<i>Western Region</i>

NOTE: Unless noted in the *Access in Hierarchy* column, all Distributor App Users will be initially added at the top of your hierarchy (they will have access to all firms, Agents, Policy Owners and policies), once they are set up the Super User can adjust their access.

Executive Users (optional)

Executive Users will have access to your entire network including all Sales Managers, Regions, Offices, Agents, Policy Owners and policies.

FIRST NAME	LAST NAME	E-MAIL	MOBILE PHONE NUMBER

Thank you!

Thank you for completing the Distributor User Form.

Please e-mail the completed form to distributor.onboarding@ins-connect.com.

If you have any questions, please e-mail Diana Klisara at diana.klisara@ins-connect.com or give us a call at 1-855-513-9524.

