

Providing your Anti-Money Laundering Proof through Sure LC (via Certificate or LIMRA) 📷

IMPORTANT NOTE before getting started:

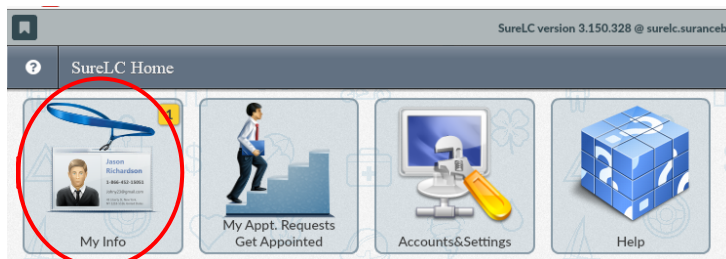
If you prefer to skip Steps 1-4 below please forward your AML certificate (for review/approval, as not *all* AML providers are universally accepted at each carrier) or LIMRA login information to LifePro so we can easily take care of it for you. Allowing Sure LC to store the LIMRA login information is especially advantageous so that we can accomplish the following without us having to contact you during your busy workday:

- Sure LC stores your password securely allowing us to see into your LIMRA transcript and notify you of any refresher courses that need updating.
- We are able to gain real-time access to see any new courses you may have completed.
- Sure LC allows us to generate a carrier-compliant snapshot of your recent course completion and forward it to the carriers that request proof.

If you still prefer to upload your AML proof independently, please continue reading. Thank you!

If you have a Sure LC account, it only takes a minute to generate your LIMRA snapshot straight from there! Sure LC, also known as "Surance Bay," is the online contracting system that producers use to appoint with carriers through LifePro.

1. <https://www.lifepro.com/surelc> → "Create/Log in to your Contracting Account" link. Login to Sure LC.
2. Click "My Info" button.



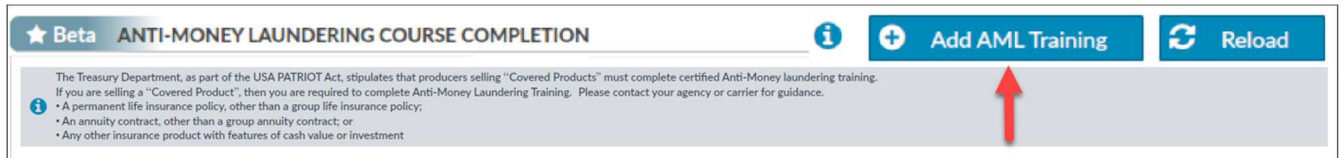
3. Click the Training tab at the bottom.



4. The following pages will show you detailed instructions for uploading your AML proof (or, if you prefer an online view, please click here: <https://support.surancebay.com/hc/en-us/articles/360035569014>)

How to Add New AML Training Course Information

Step 1: Click "Add AML Training" to import AML training courses or to add courses manually.



Step 2: Enter the name of the Course Provider. Clicking into the search field will open the list of popular providers. If listed, choose the provider from the list. If not don't worry, just manually enter the name of the provider.



Step 3: Next, choose to import provider courses or add manually. Import provider courses is selected by default. If you have logon credentials for the selected course provider (username & password) you can review and agree to the terms and then enter your username and password in the fields provided and SureLC will retrieve the training information for you. If you don't have it simply click "No Thanks" and/or "Add Manually" to enter the information yourself.

Select or enter course provider

* Course provider

QuestCE, Inc.

Hint: You can import provider courses or add them manually

Import provider courses Add manually

(BETA) Import Courses from provider

We'll automatically get a screenshot of your trainings from QuestCE, Inc.. By clicking on the "I agree", you hereby authorize SureLCBay to access your account for the sole purpose to obtain and maintain the history of the training and completion dates that you have completed through QuestCE, Inc..

I agree No Thanks

We're about to get it for you, but we need your QuestCE, Inc. username and password.

* Username: * Password:

Retrieve trainings

Close

Step 4: When not importing the information automatically, add manually will be selected. Using this screen, you'll need to upload a copy of your AML certificate and enter the requested information. Click on the cloud icon to upload a copy of your certificate.

Select or enter course provider

* Course provider

QuestCE, Inc.

Hint: You can import provider courses or add them manually

Import provider courses Add manually

Select AML Certificate

There are no certificates available, please upload one

Add training: AML

* Course Name

Type to search CE course by Name or ID

* Completion Date

MM/DD/YYYY

Add Close

Once the certificate is successfully uploaded an auto preview pane will open to the right. Review the certificate information to make sure it looks correct.

The screenshot shows a web application interface for QuestCE. On the left, there is a form titled "Select or enter course provider" with a dropdown menu showing "QuestCE, Inc.". Below this is a section "Select AML Certificate" with a file upload icon and a list of uploaded certificates, including "AML_Certificate_for_Kraig_Williams.png" with an upload date of "10/14/19". There is also a section "Add training: AML" with a "Course Name" field (placeholder: "Type to search CE course by Name or ID") and a "Completion Date" field (placeholder: "MM/DD/YYYY"). At the bottom of the form are "Add" and "Close" buttons. On the right, a preview pane shows a certificate from Quest CE Solutions. The certificate is titled "Certificate of Completion IS Presented To" and is for "Kraig Williams". It certifies that on "10-3-2018", the named individual completed the "Anti-Money Laundering: Customer Identification Programs, Red Flags, Everyday Scenarios Enforcement Cases (FE INT)" course. The certificate also mentions "Online Training Course", "30 Minutes", and "Quest Continuing Education Solutions". The Quest CE Solutions logo and address (10100 West Innovation Drive, Suite 200, Milwaukee, WI 53226) are at the bottom.

Step 5: Next, enter the course name in the field provided. In some cases, the course name may be found on the AML certificate.

This screenshot shows the same QuestCE interface as the previous one, but with the "Course Name" field highlighted by a red box and containing the text "Anti-Money Laundering". A red arrow points to the "Completion Date" field, which is currently empty. The "Add" and "Close" buttons are still visible at the bottom.

Step 6: After entering the name of the course, the course id field will be shown. Enter the course id if you have it (this is optional). Next, enter the completion date and then review the information entered. If everything is verified click "Add" to update the AML table section.

Select or enter course provider

* Course provider

QuestCE, Inc.

Hint: You can import provider courses or add them manually

Import provider courses Add manually

Select AML Certificate

AML_Certificate_for_Kraig_Williams.png
Uploaded on: 10/28/19

Add training: AML

* Course Name

Anti-Money Laundering

*We couldn't find the course in our database. Are you sure that course name was written correctly?

Course Id

555869

* Completion Date

10/03/2018

Add Close

Step 7: Once added, the dialog box will close, and the AML training course information will now be shown in the course section.

★ Beta ANTI-MONEY LAUNDERING COURSE COMPLETION

Add AML Training Reload

QuestCE, Inc. Anti-Money Laundering	Course completed on 10/03/2018	Certificate Uploaded on 10/14/2019	
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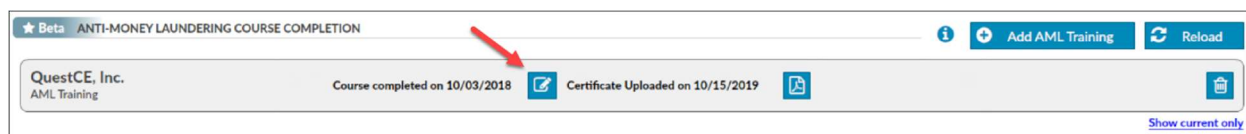
Show current only

Repeat steps 1-6 to add additional AML courses.

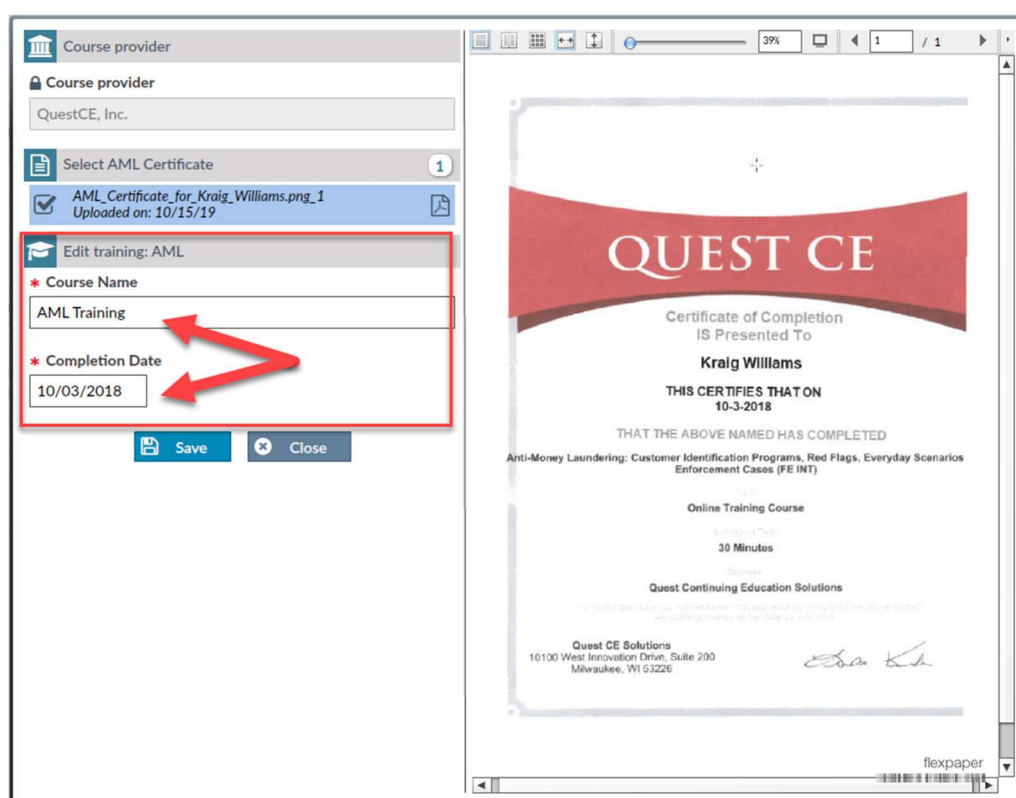
Please Note: The trash can icon will only be shown for manually added AML courses. When AML course information is pulled directly from the provider (as shown in the Training Course section 3 below) this information cannot be edited or deleted. Contact SuranceBay technical support for help with this task if needed.

How to Edit Existing AML Training Course Information

Step 1: Select the “Edit AML Training” button on the AML training row you want to modify. This will open the properties dialog box where the current information can be modified.



Step 2: Using the Edit Training: AML section you can change the Course Name, Course ID and Completion date only.



Step 3: Once you’ve made the desired changes to the AML information click the “Save” button to update the AML section with the new information. In the following example, the name of the AML training course has been changed. Please note to change the provider name or AML certificate you must delete the training information row completely using the trashcan icon on the right and add it again with the new information.

