AFEUSA
Agent Assist

Association for Entrepreneurship

Part 1 - Access

Desk

Association for Entrepreneurship

AFEUSA Desk Portal

<u>Desk.sellafe.com</u>

- Username is your Email Address
- Input your Password
- Complete the reCAPTCHA
- Sign In

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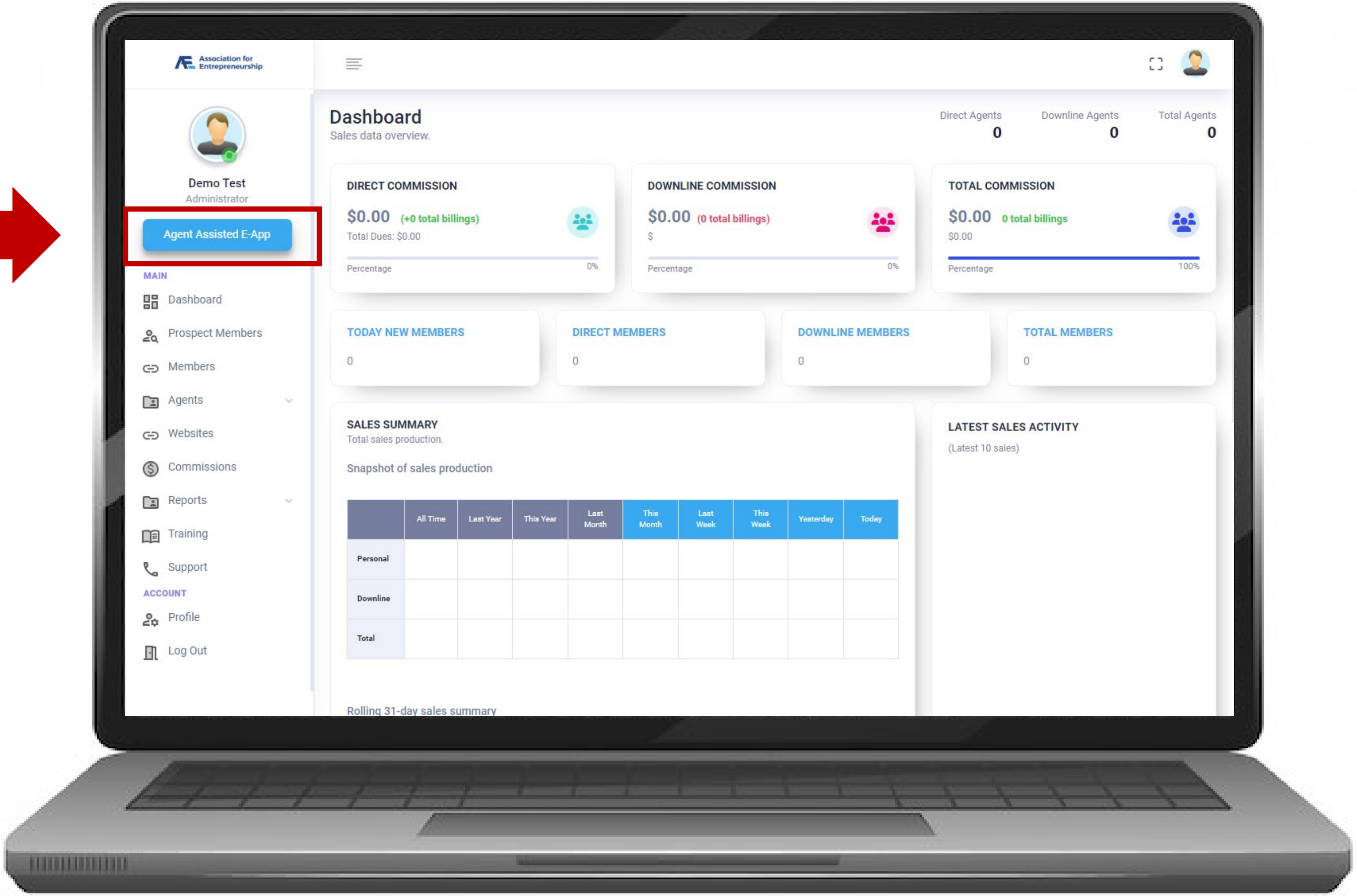
AFEUSA Desk Portal

Step 1:

- Click on Agent Assisted E-App



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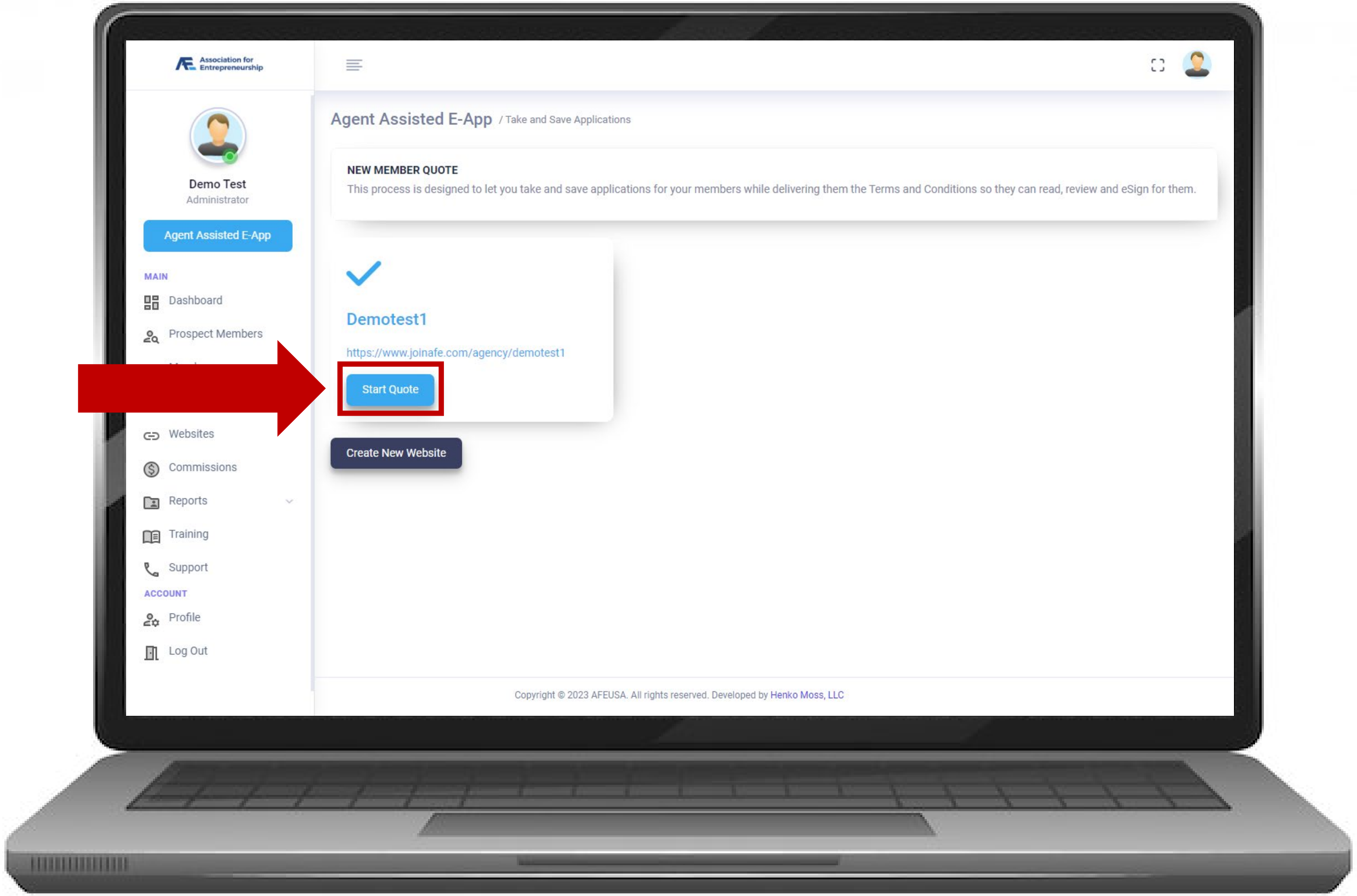
AFEUSA Desk Portal

Step 2:

- Click on Start Quote



Association for Entrepreneurship

Part 2 - Quote

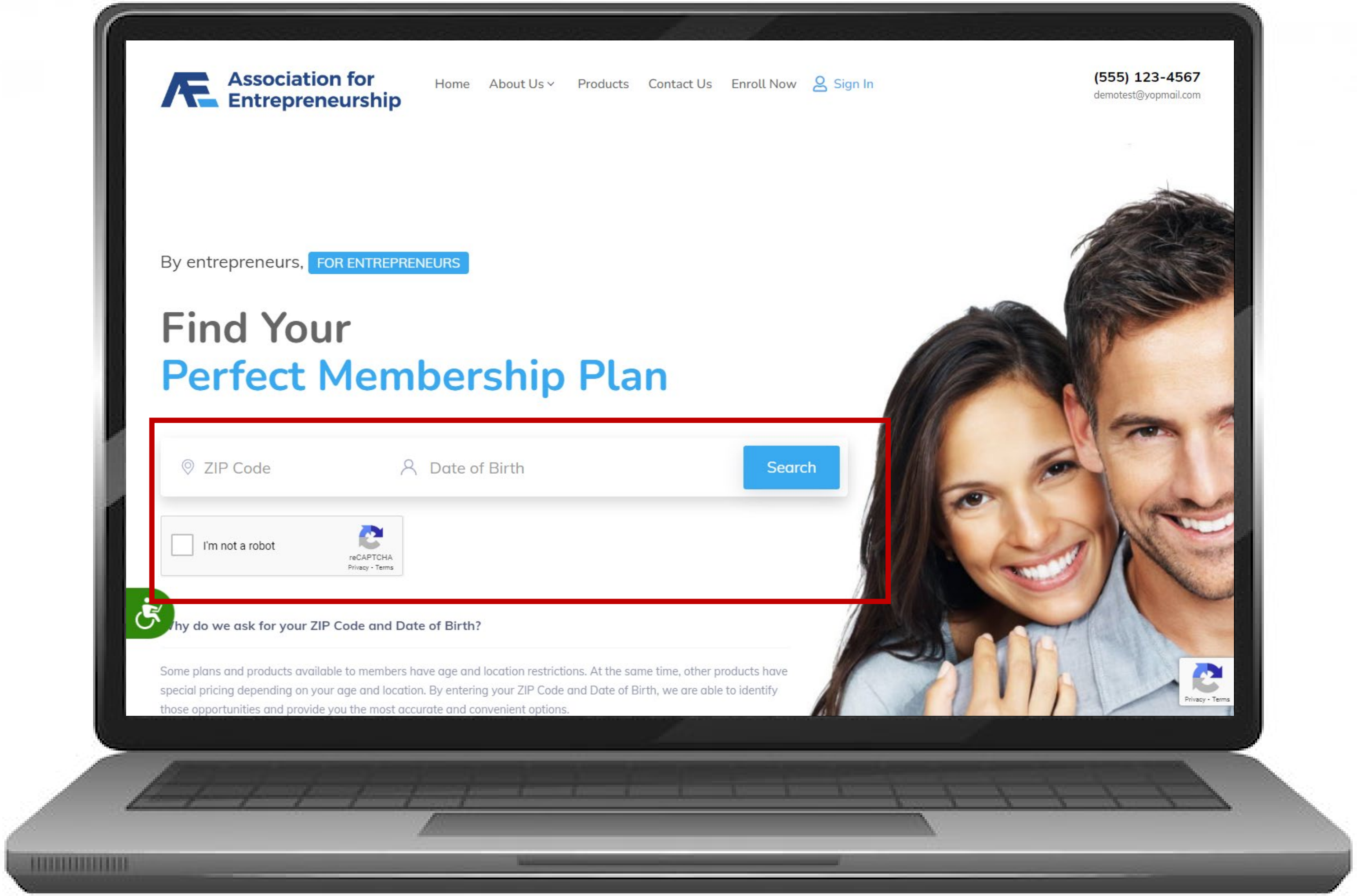
Enrollment

Association for Entrepreneurship

Agent Assist

Products are Filtered By State and Age:

- ZIP Code
- Date of Birth
- Complete the reCAPTCHA
- Search



IMPORTANT TIP

If you need to modify information on the LifeTime Benefit Term Quote you will need to restart from this step.

Association for Entrepreneurship

Select Membership

Step 1:

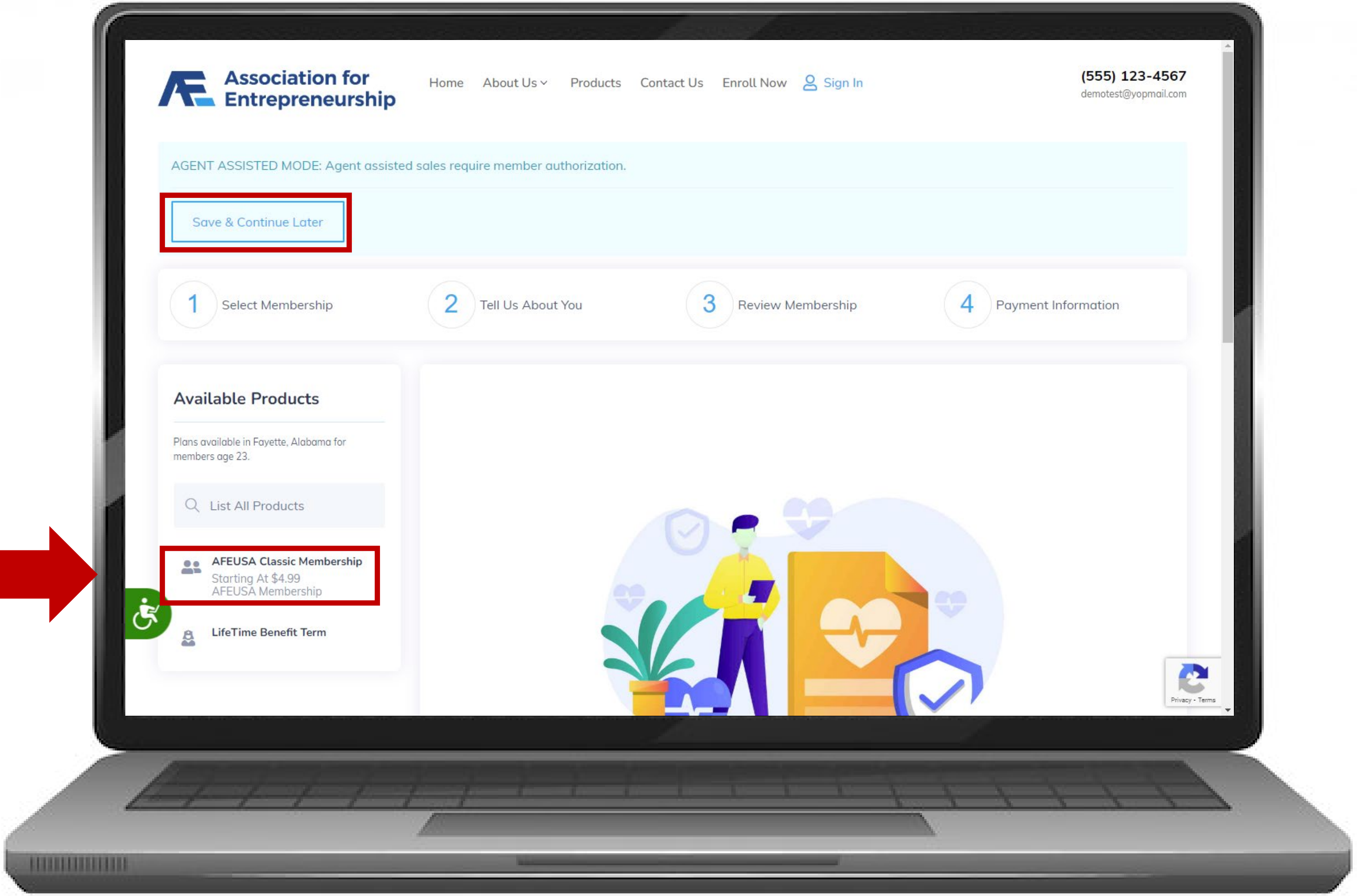
- Click on AFEUSA Classic Membership

IMPORTANT TIPS

A Membership is required to purchase insurance.

You can save the quote at any time to continue later.

Navigate by clicking on the steps, do not press back in your web browser or you will need to restart the quote.

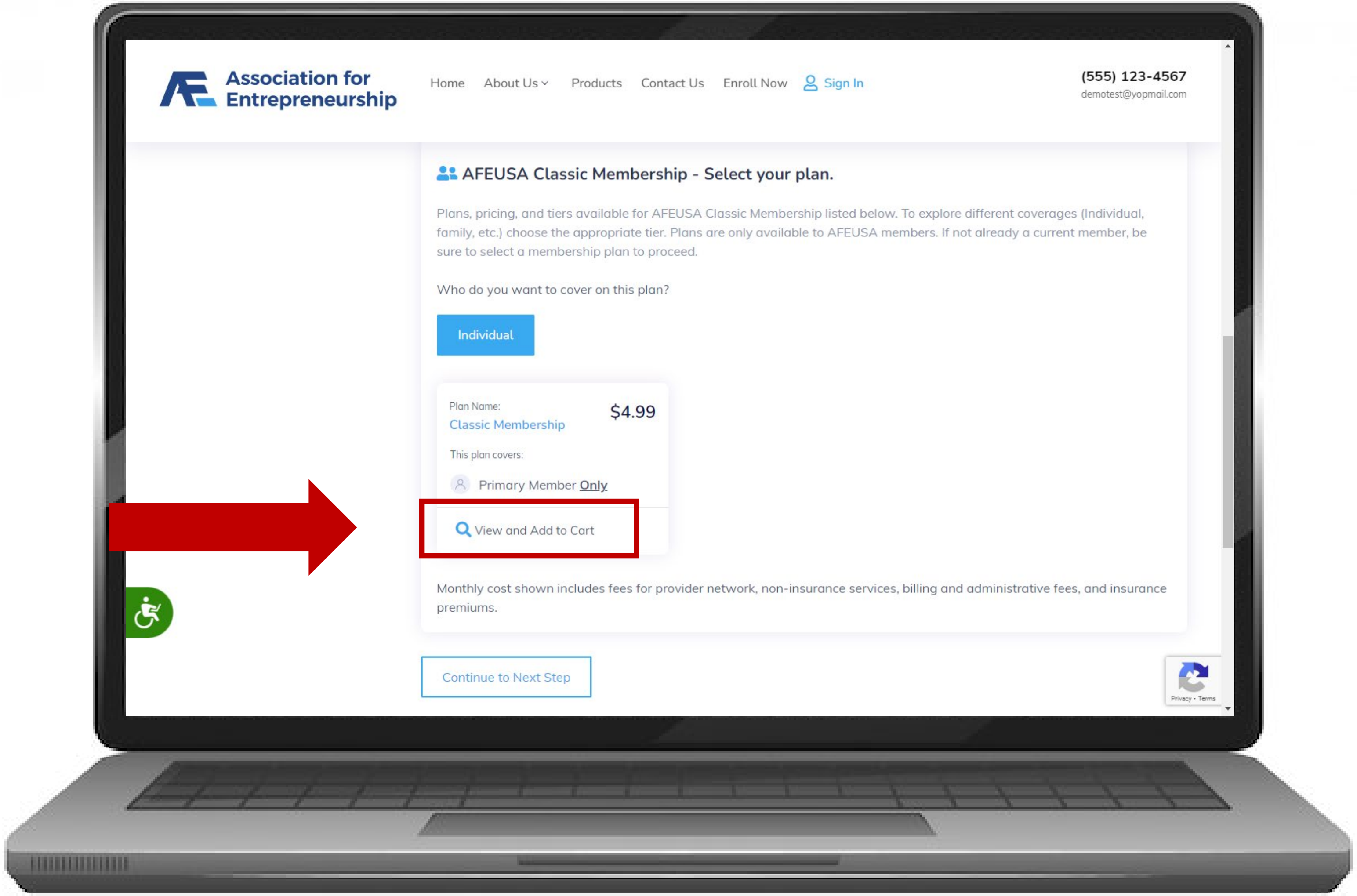


Association for Entrepreneurship

Select Membership

Step 1 Continued:

- Scroll Down
- Click on View and Add to Cart



Association for Entrepreneurship

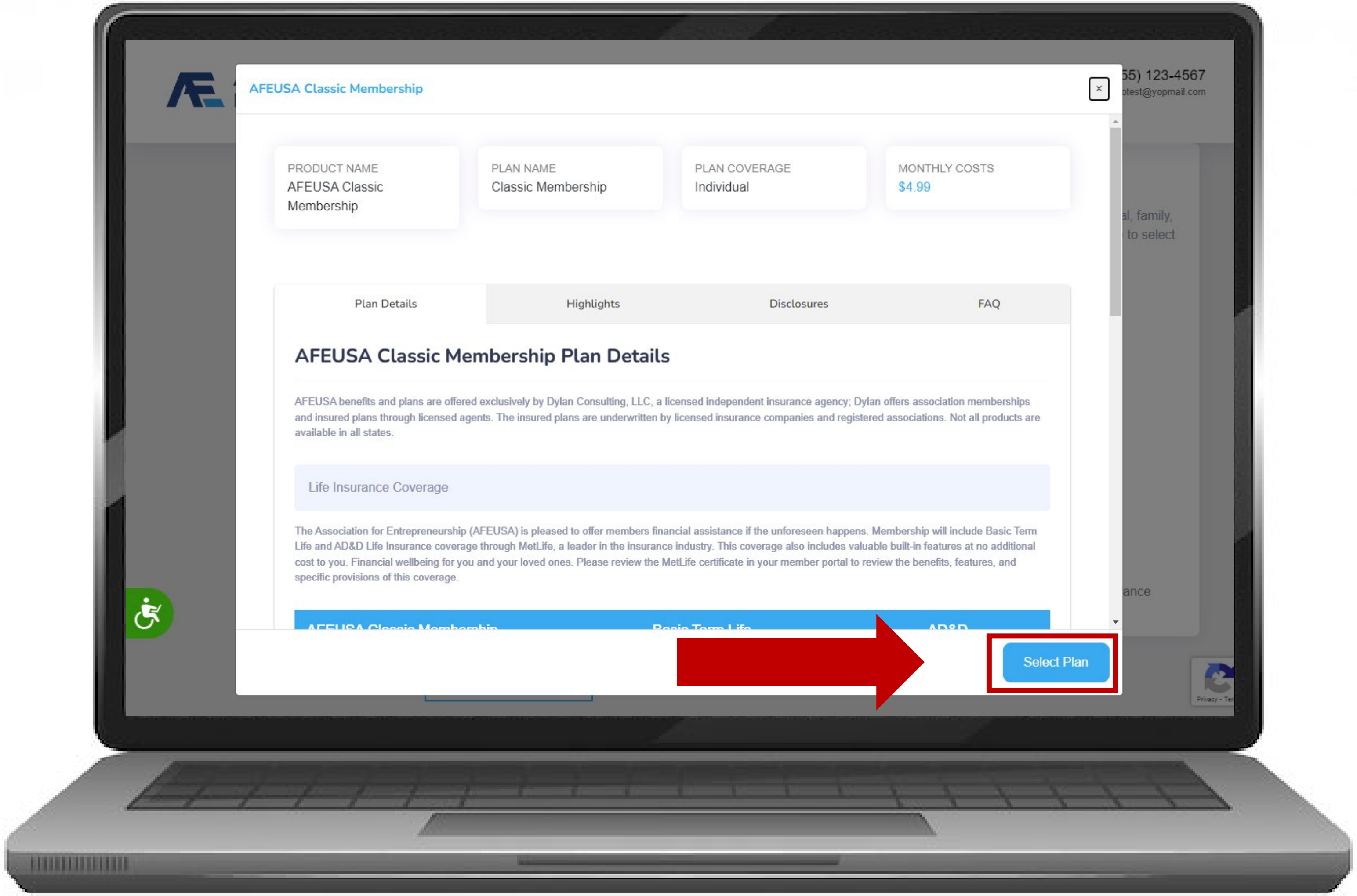
Select Membership

Step 1 Continued:

- Click on Select Plan

IMPORTANT TIP

You can learn more about the product by clicking on the varies tabs: Plan Details, Highlights, Disclosures, and FAQ.

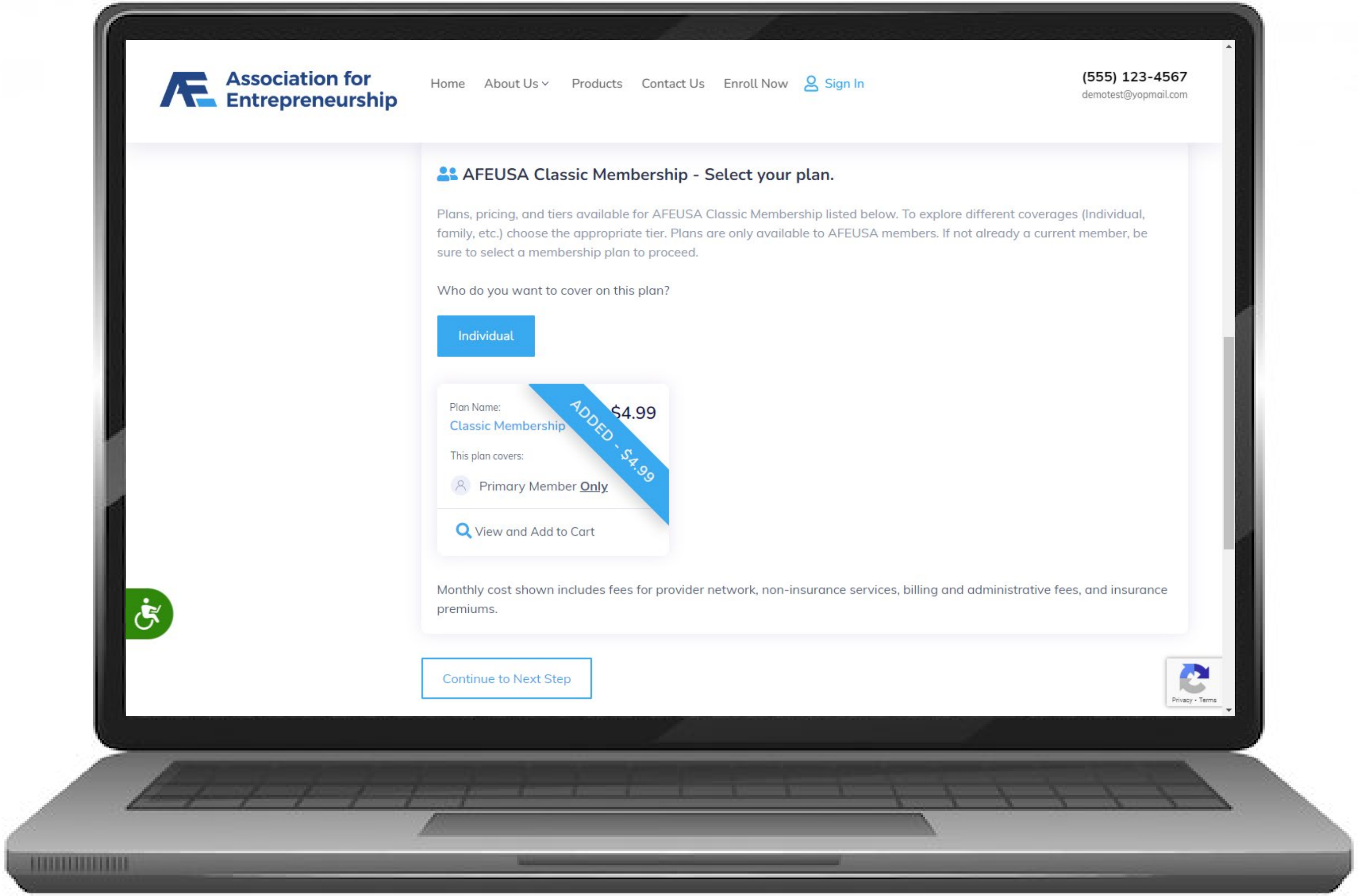


Association for Entrepreneurship

Select Membership

Step 1 Continued:

- The AFEUSA Classic Membership is now in your Cart
- Time to buy insurance – Scroll Up

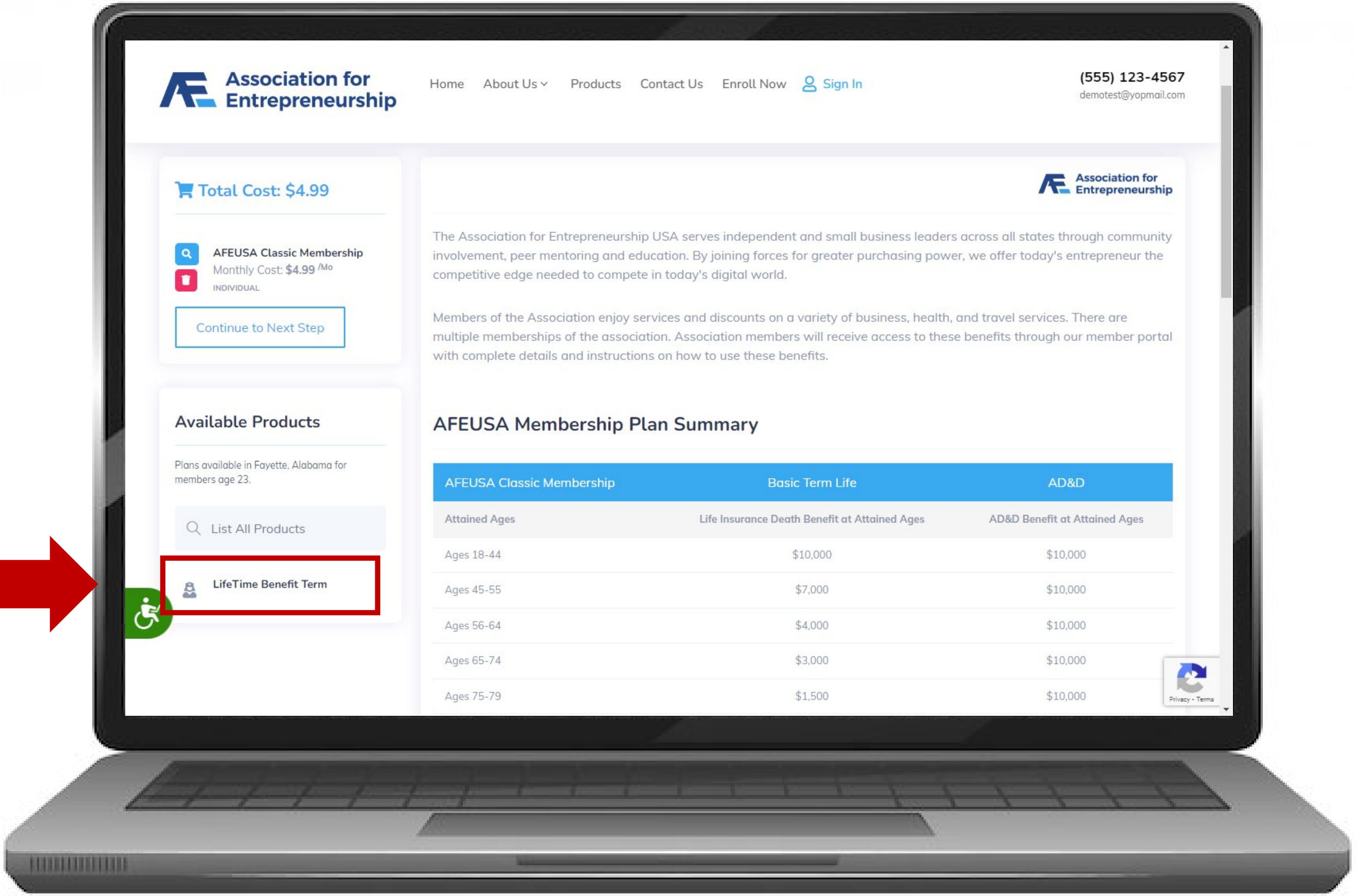


Association for Entrepreneurship

Select Membership

Step 1 Continued:

- Click on LifeTime Benefit Term



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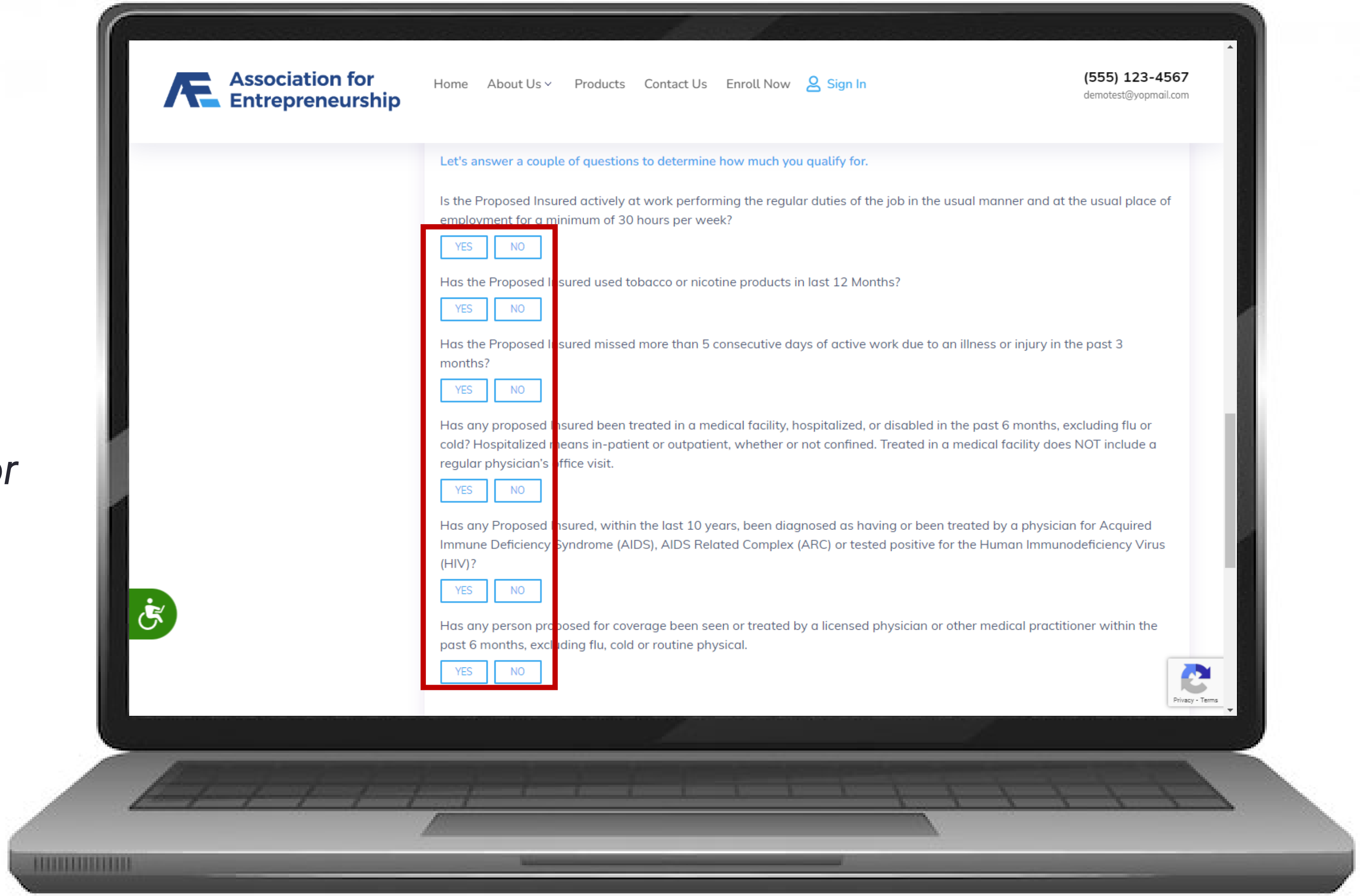
Select Membership

Step 1 Continued:

- Scroll Down
- Answer the Questions

IMPORTANT TIP

If you answer yes to any of the bottom 4 questions your client will be disqualified for coverage.

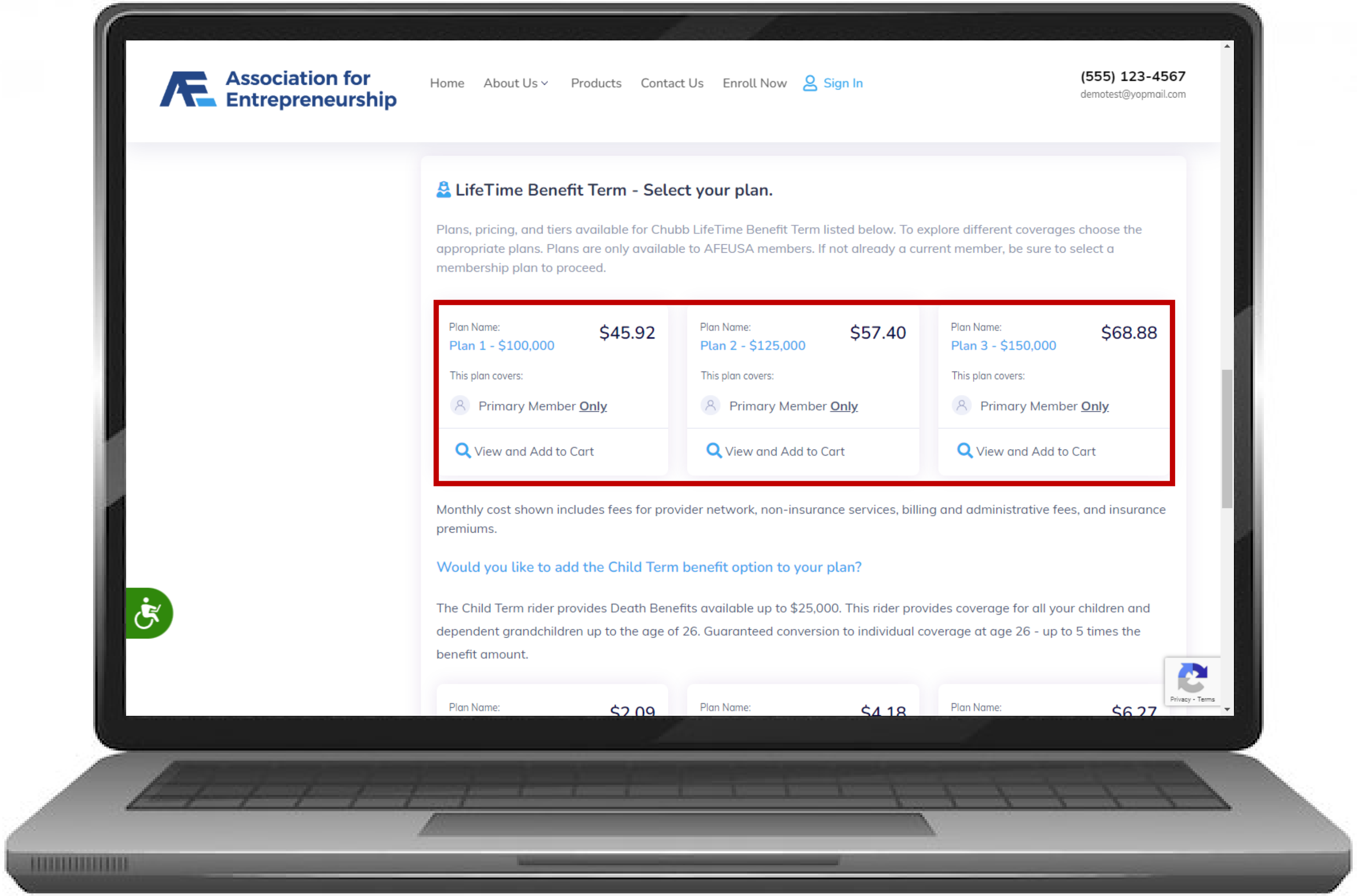


Association for Entrepreneurship

Select Membership

Step 1 Continued:

- Find the Plan That's Best For Your Client
- Click on View and Add to Cart



Association for Entrepreneurship

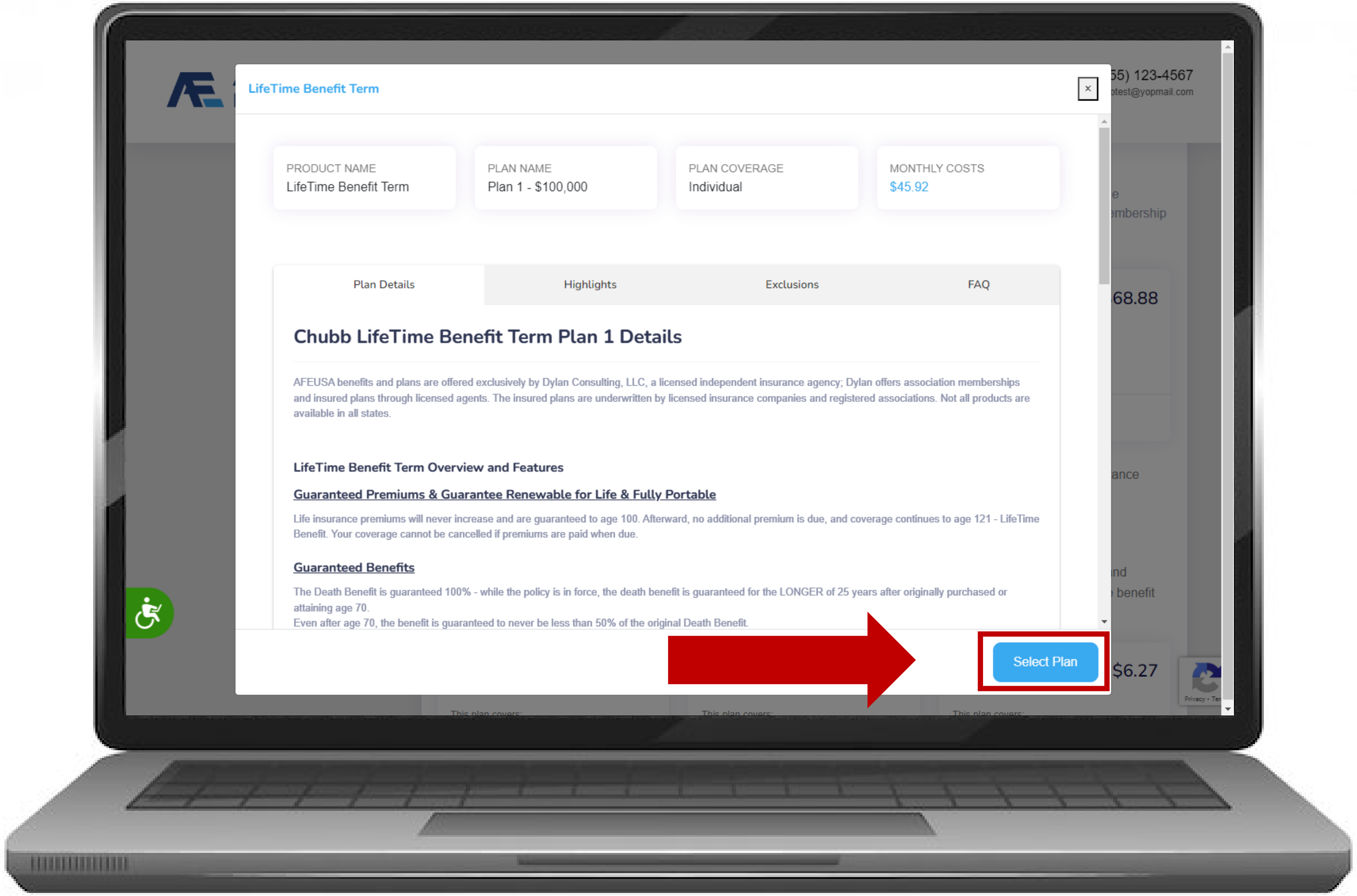
Select Membership

Step 1 Continued:

- Find the Right Plan for your Client
- Click on View and Add to Cart

IMPORTANT TIP

You can learn more about the product by clicking on the varies tabs: Plan Details, Highlights, Disclosures, and FAQ.

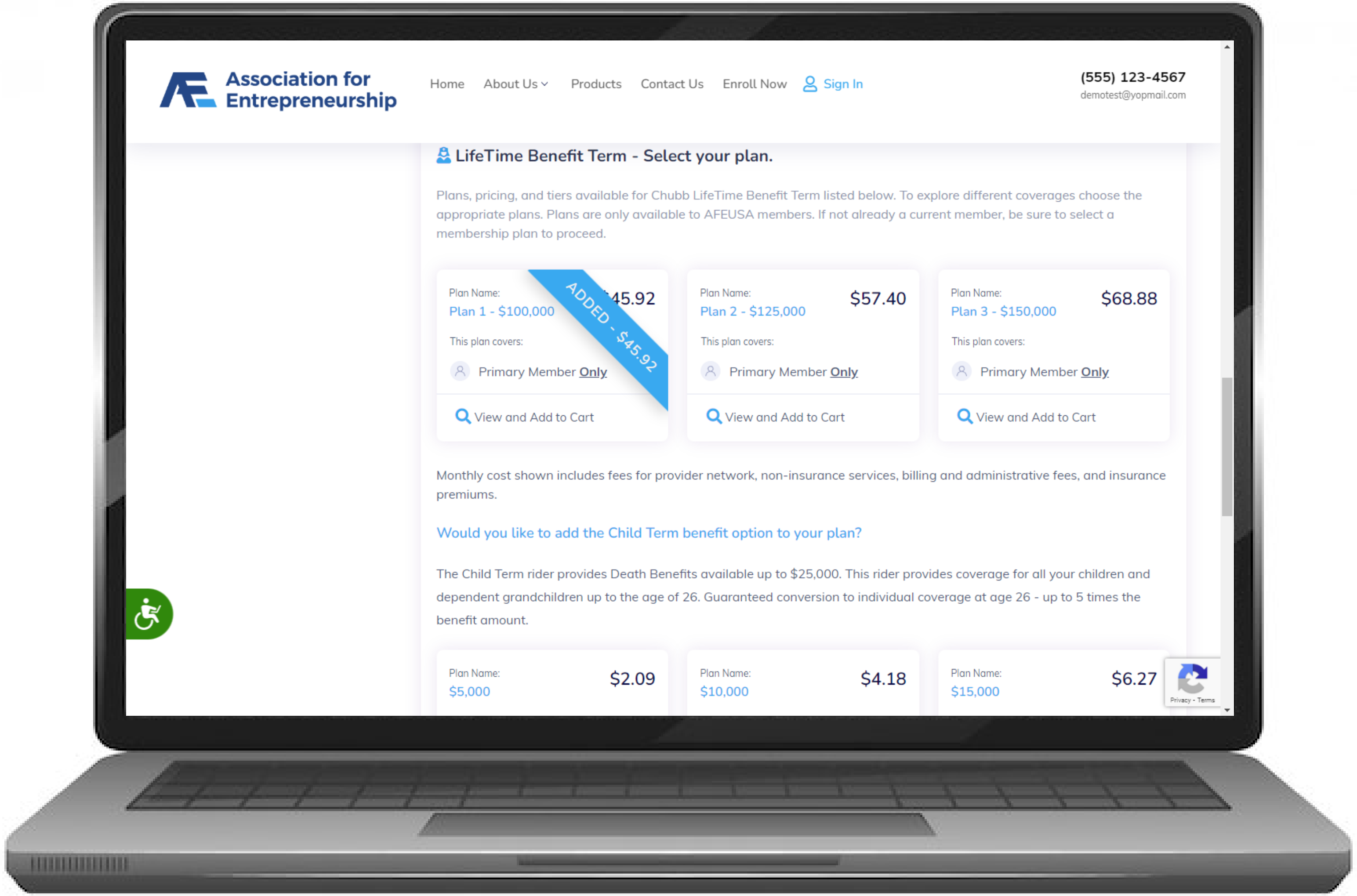


Association for Entrepreneurship

Select Membership

Step 1 Continued:

- The AFEUSA Classic Membership is now in your Cart
- Scroll Down

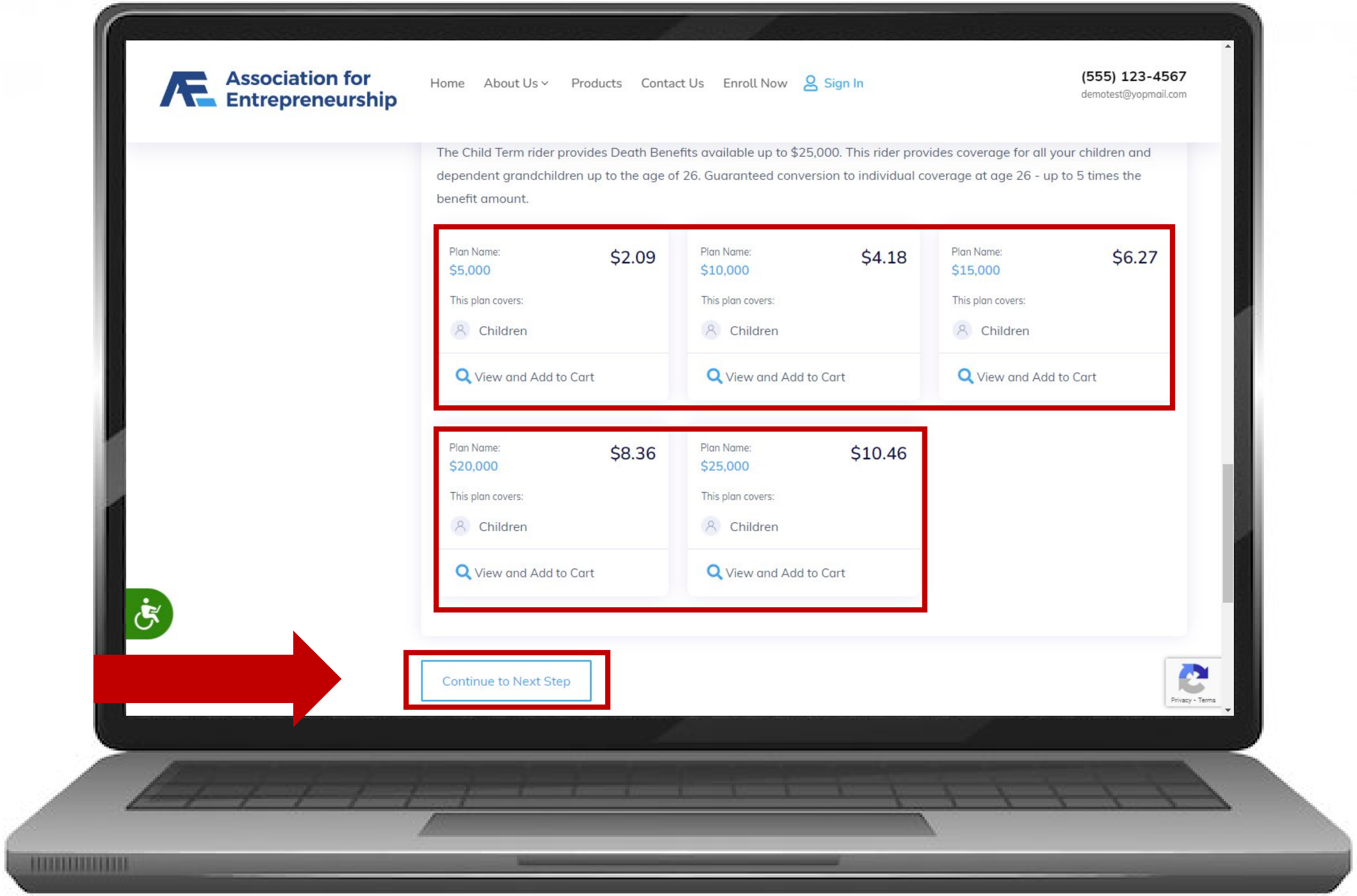


Association for Entrepreneurship

Select Membership

Step 1 Continued:

- ***Optional: Add a Child***
- *Find the Plan That's Best For Your Client*
- *Click on View and Add to Cart*
- Continue to Next Step

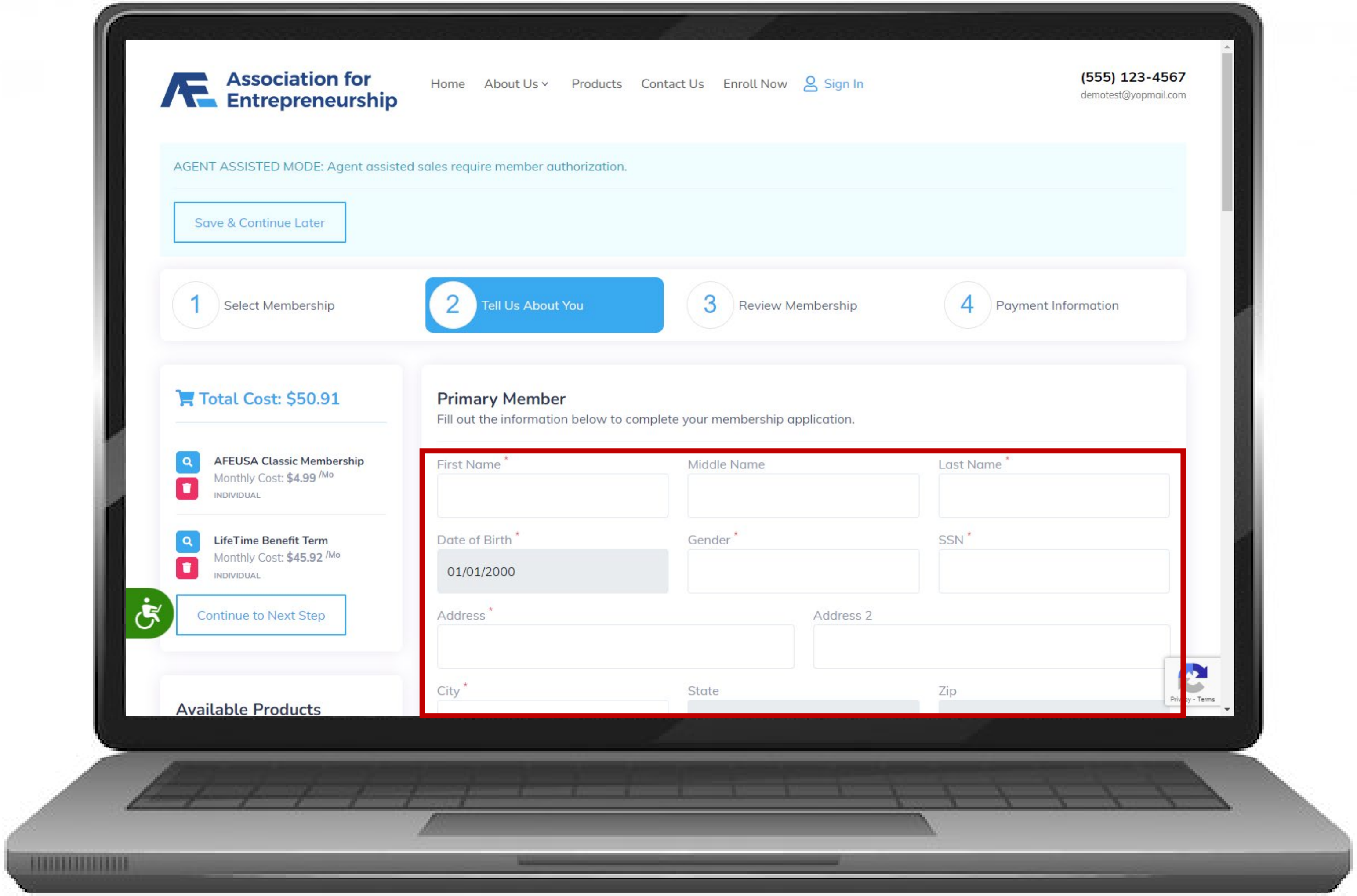


Association for Entrepreneurship

Tell Us About You

Step 2:

- Complete the Form for the Primary Member
- First Name, Last Name, Gender, SSN, Address, City
- Scroll Down to see more info

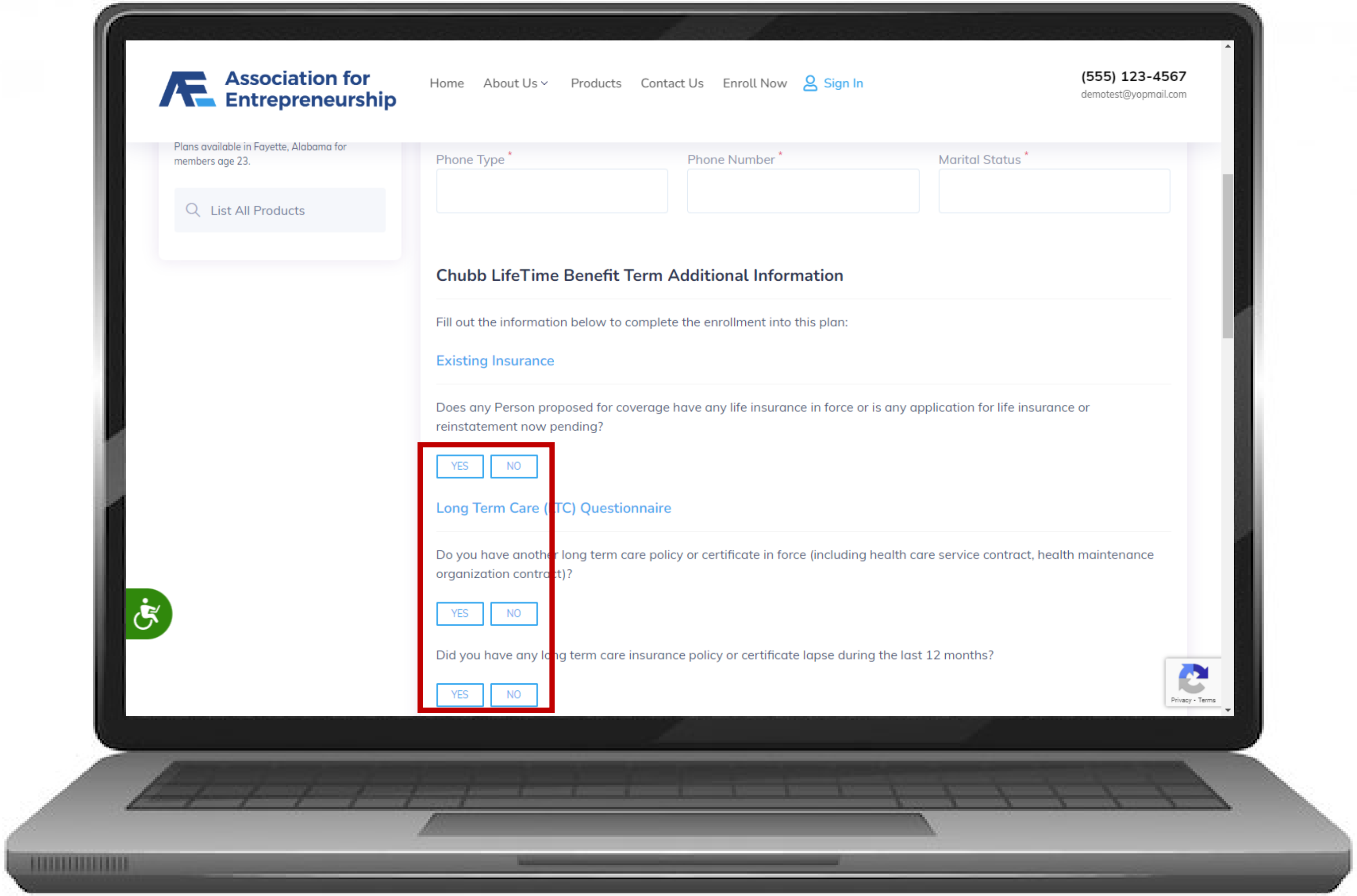


Association for Entrepreneurship

Tell Us About You

Step 2 Continued:

- Finish the Form for the Primary Member
- Phone Type, Phone Number, Marital Status
- Answer the Questions
- Scroll Down to see more

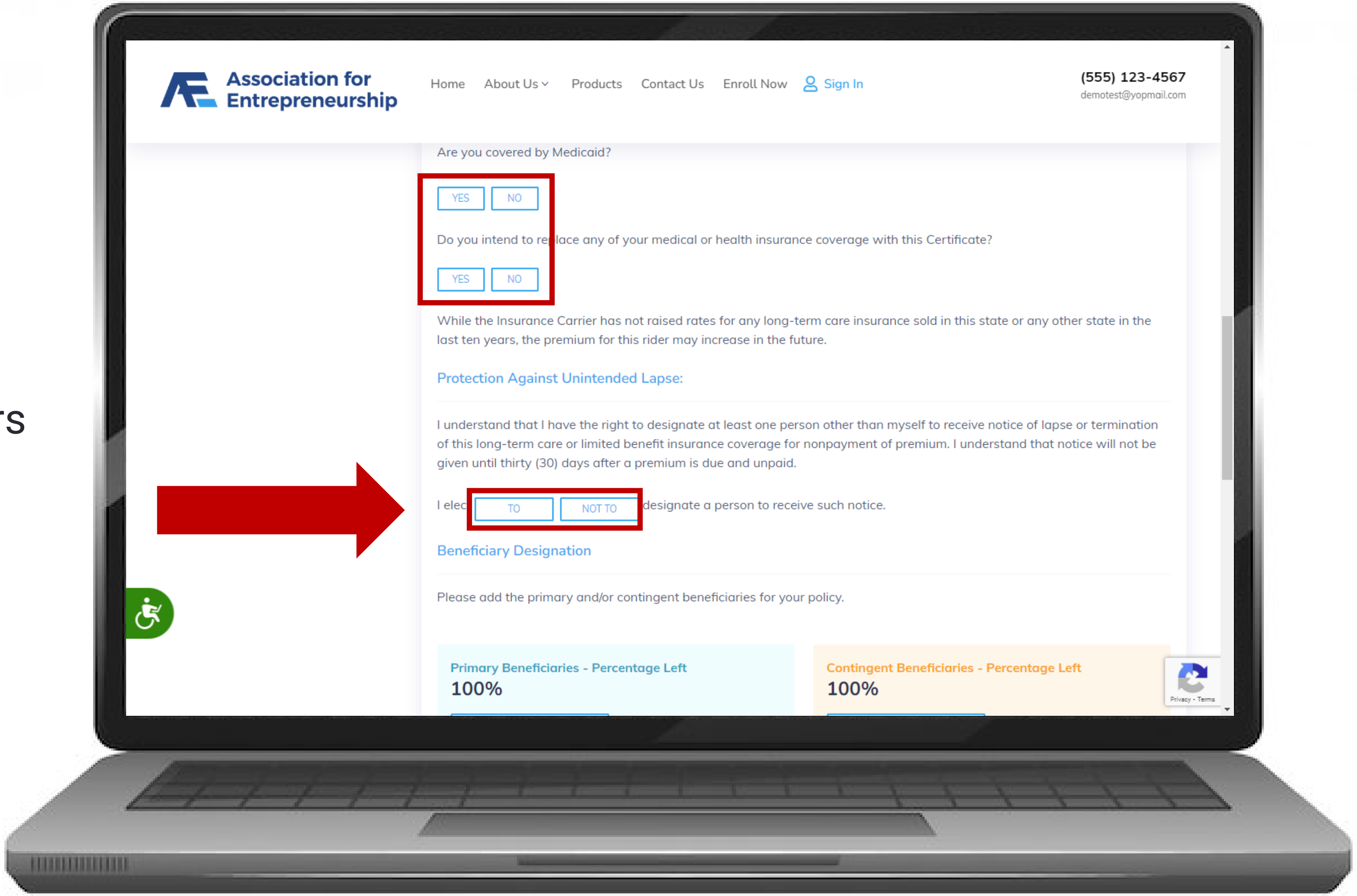


Association for Entrepreneurship

Tell Us About You

Step 2 Continued:

- Finish the Questions
- Choose if you Elect to Designate a Person to Receive a Notice
- If Yes, Complete the Form that Appears
- Scroll Down to see more

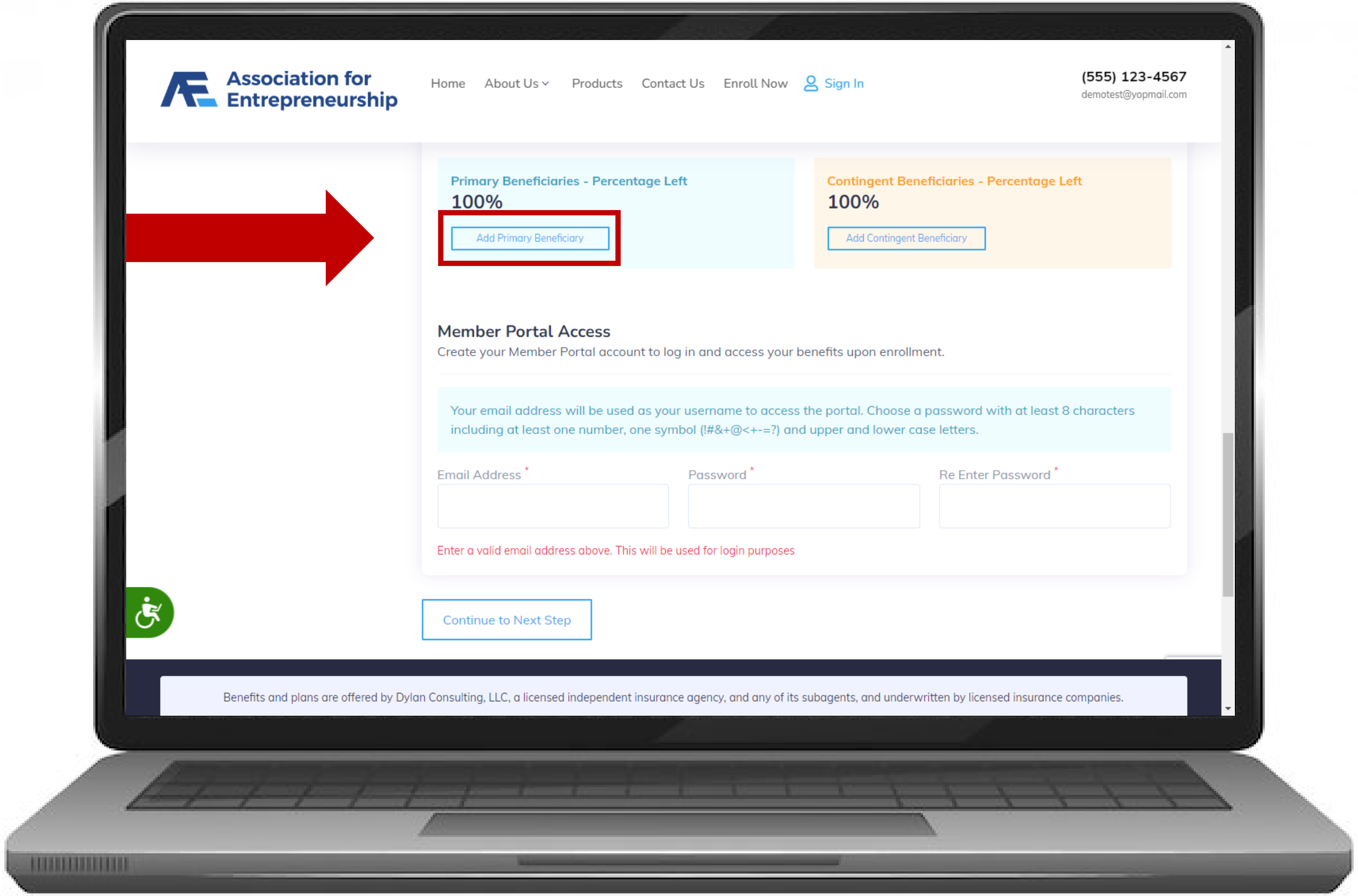


Association for Entrepreneurship

Tell Us About You

Step 2 Continued:

- Click on Add Primary Beneficiary

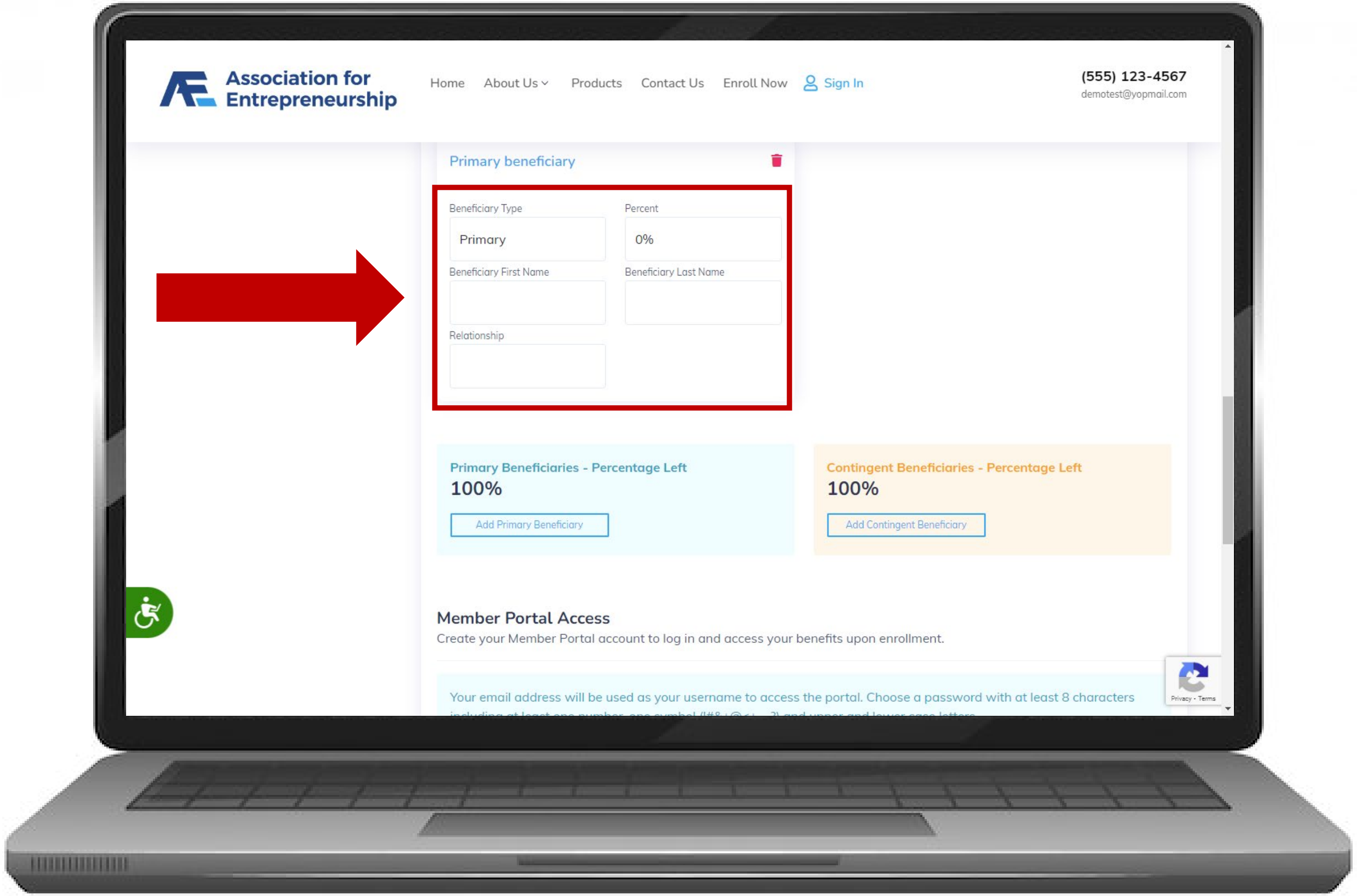


Association for Entrepreneurship

Tell Us About You

Step 2 Continued:

- Complete the Primary Beneficiary Form
- Percent – if it's not 100% add another Primary Beneficiary
- Beneficiary First Name
- Beneficiary Last Name
- Relationship



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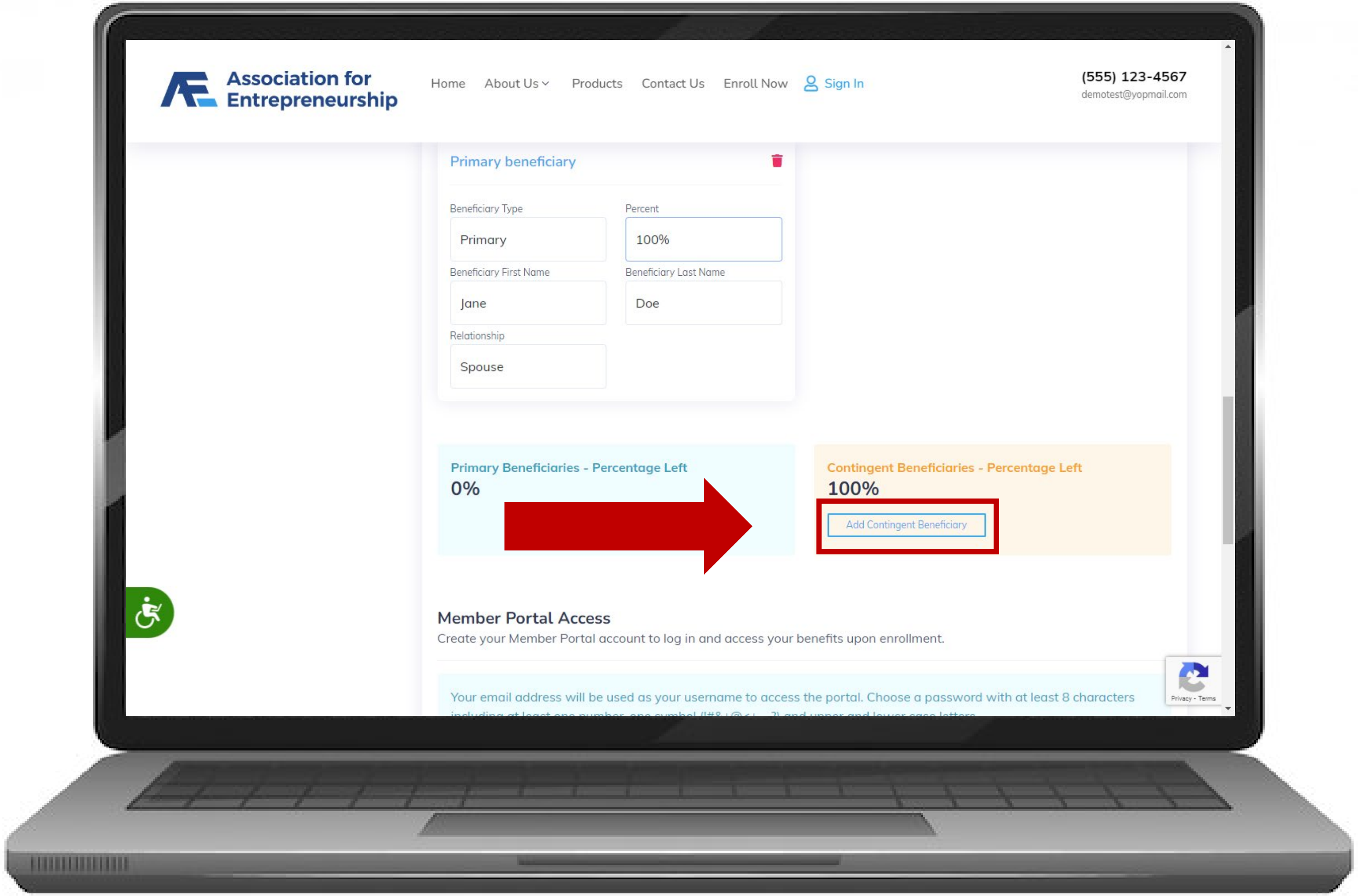
Tell Us About You

Step 2 Continued:

- Click on Add Contingent Beneficiary

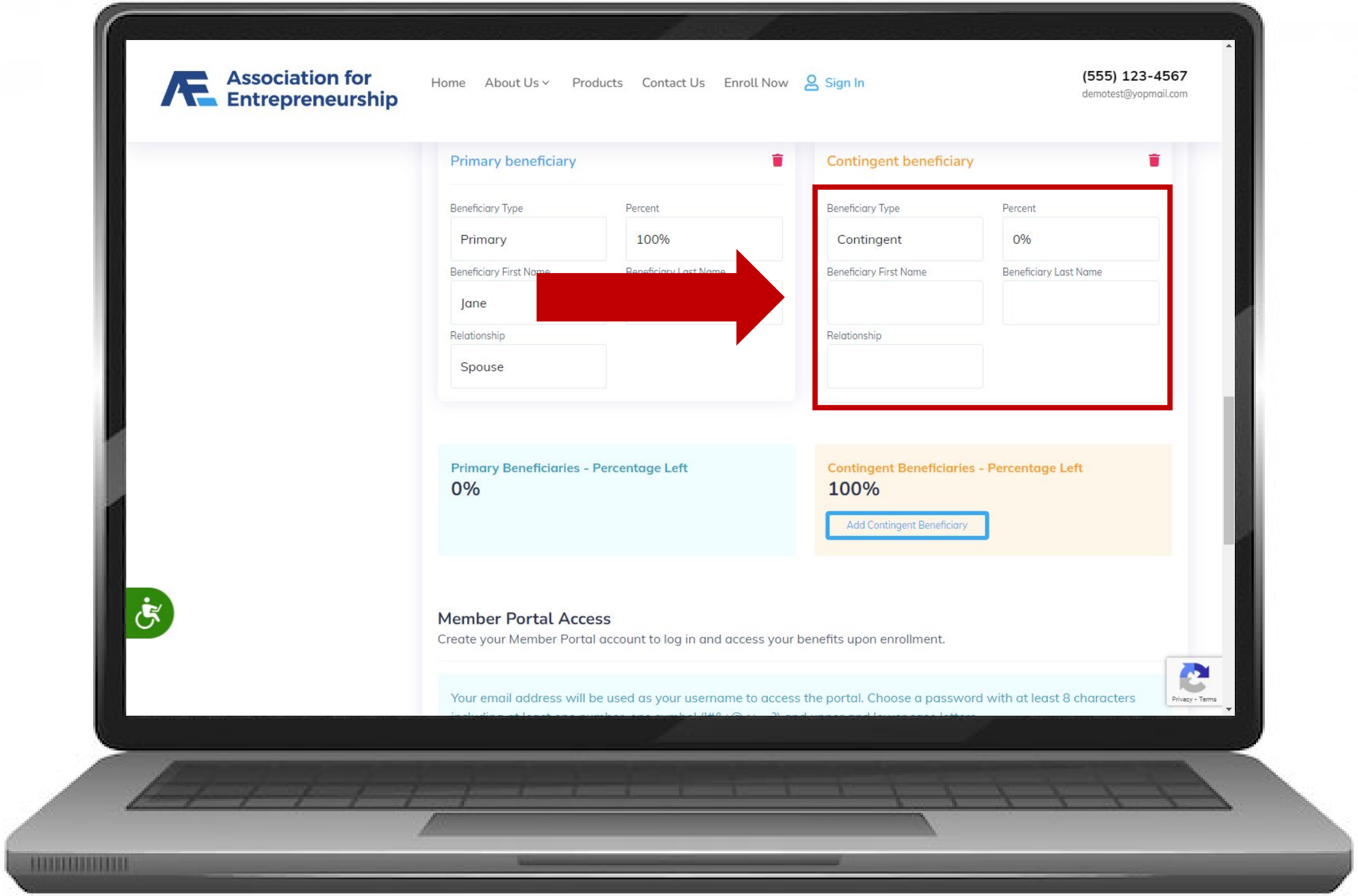


Association for Entrepreneurship

Tell Us About You

Step 2 Continued:

- Complete the Contingent Beneficiary Form
- Percent – if it's not 100% add another Contingent Beneficiary
- Beneficiary First Name
- Beneficiary Last Name
- Relationship

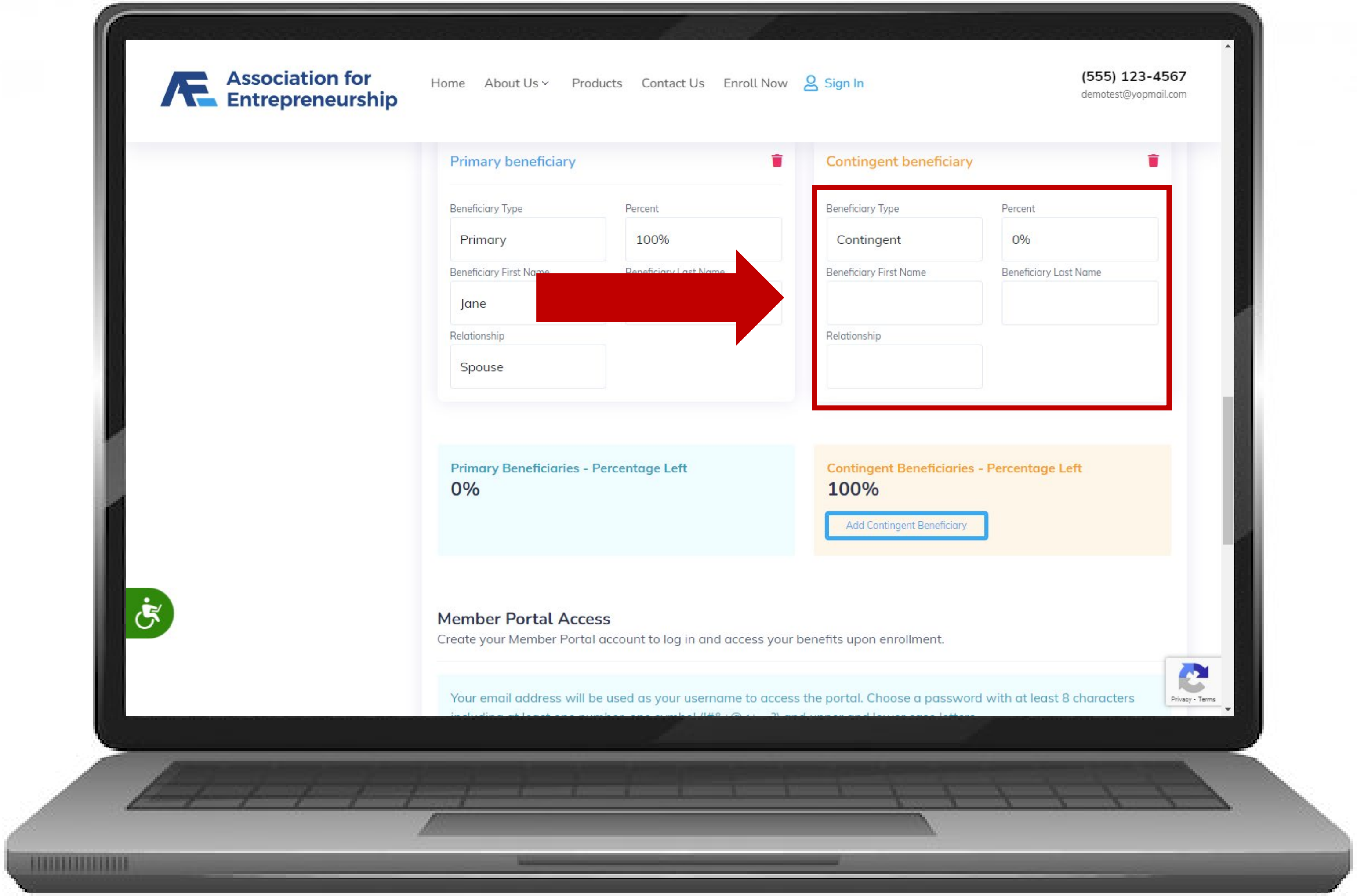


Association for Entrepreneurship

Tell Us About You

Step 2 Continued:

- Complete the Contingent Beneficiary Form
- Percent – if it's not 100% add another Contingent Beneficiary
- Beneficiary First Name
- Beneficiary Last Name
- Relationship



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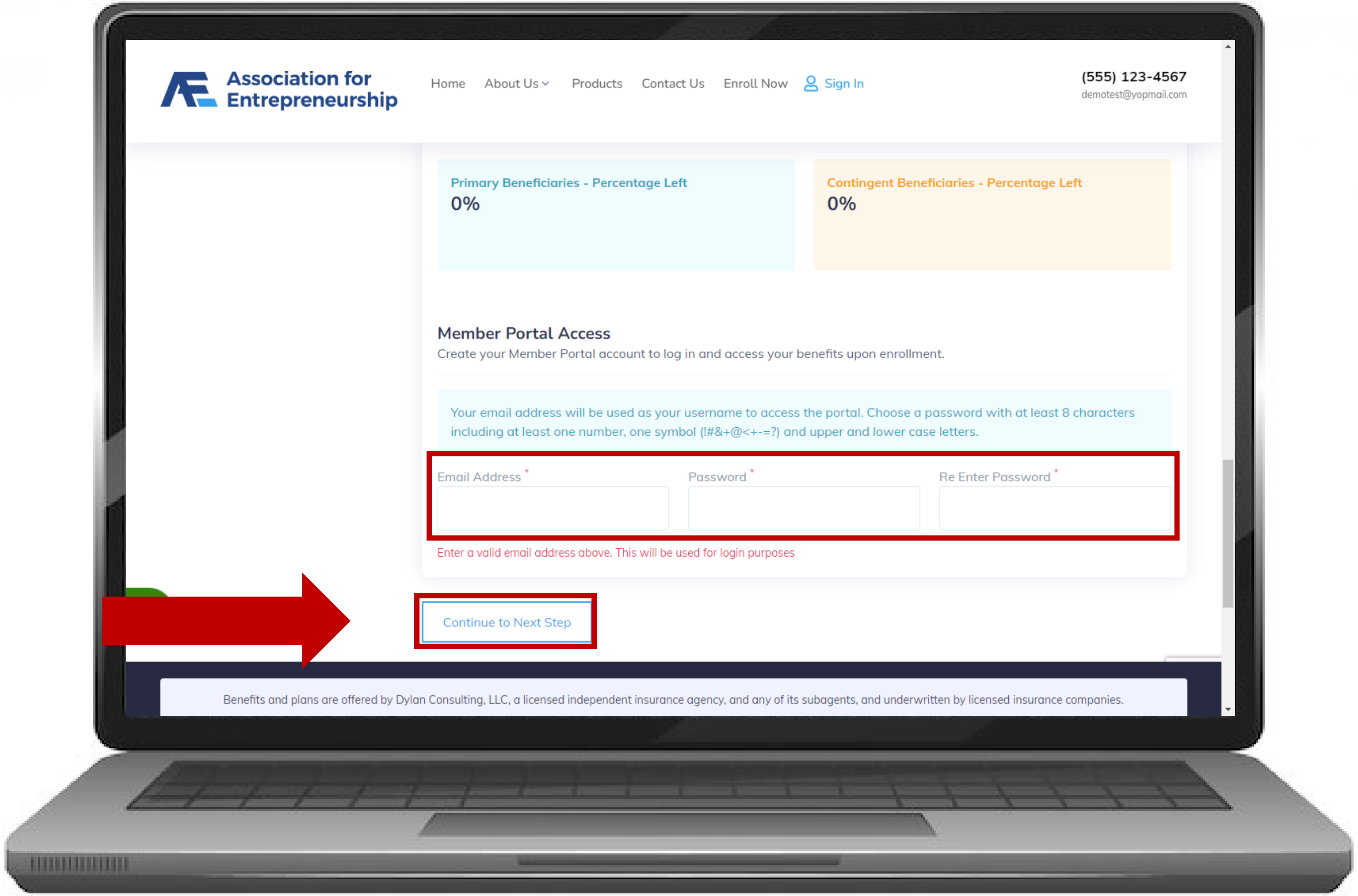
Tell Us About You

Step 2 Continued:

- Create Your Client's Login Info

- Email Address
- Password
- Re-enter Password
- Click on Continue to Next Step



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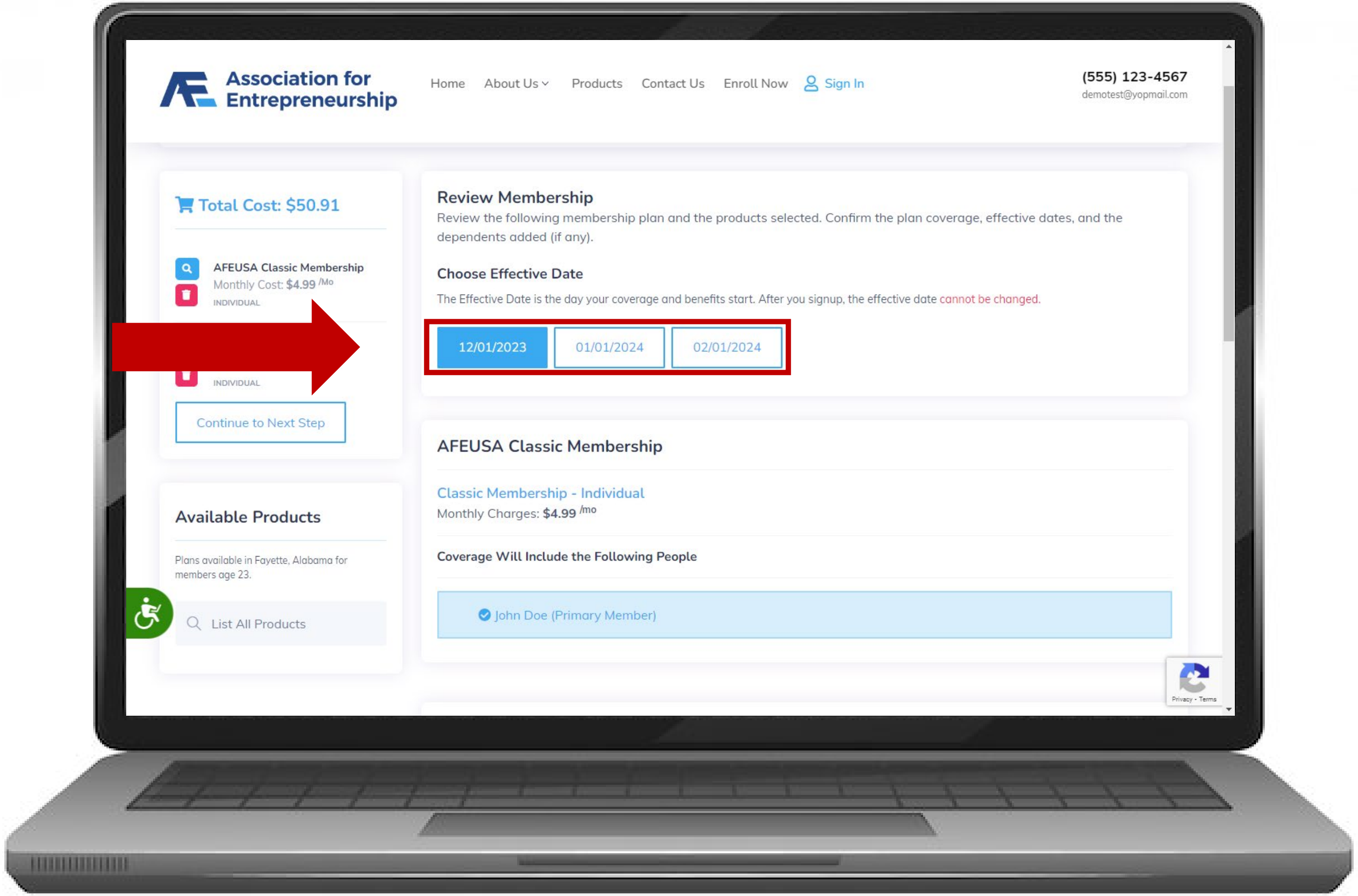
Review Membership

Step 3:

- Choose Effective Date
- Scroll Down

IMPORTANT TIP

If you enroll on or after the 21st the earliest effective date will be 2 months away.

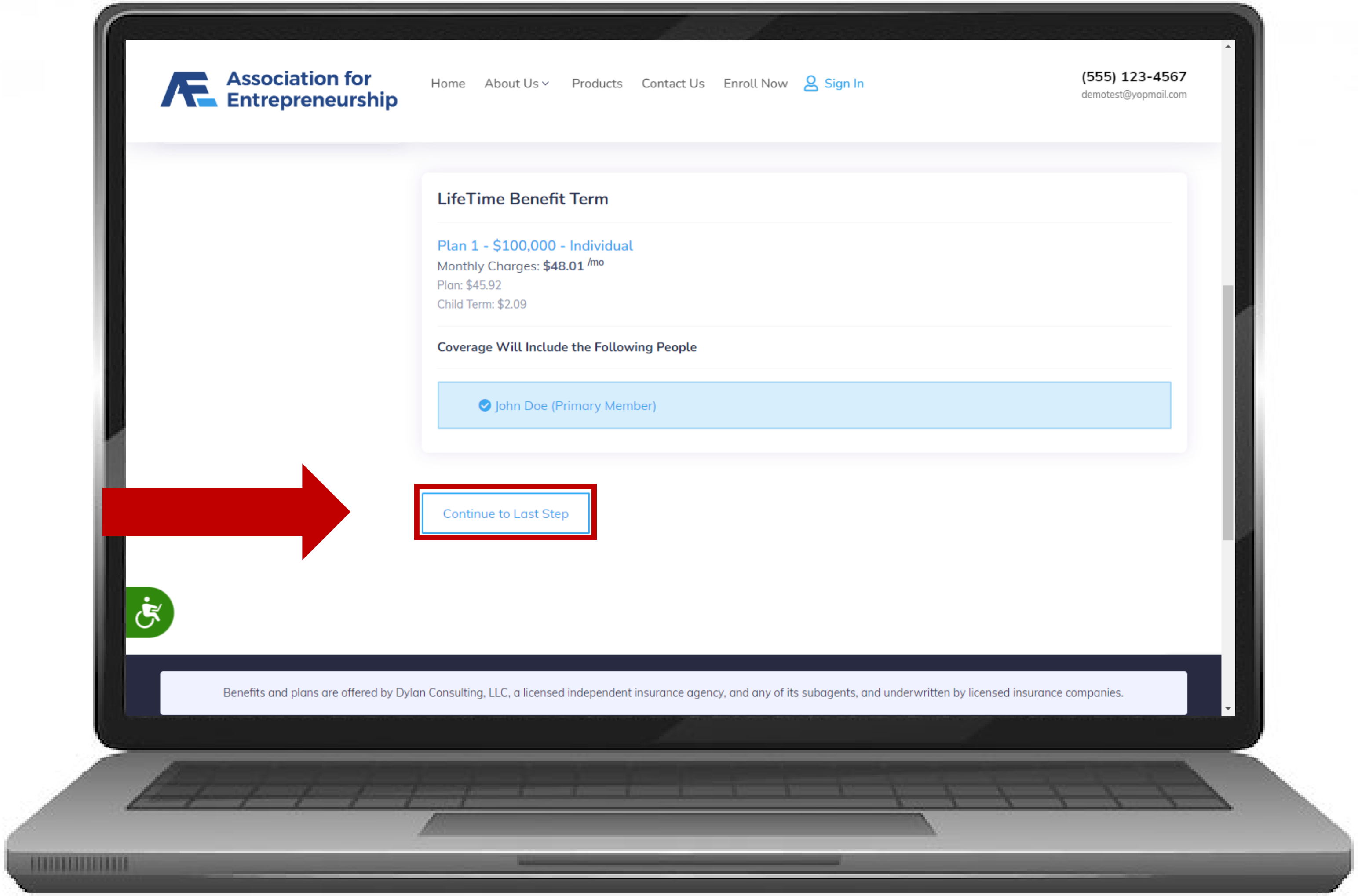


Association for Entrepreneurship

Review Membership

Step 3 Continued:

- Click on Continue to Last Step



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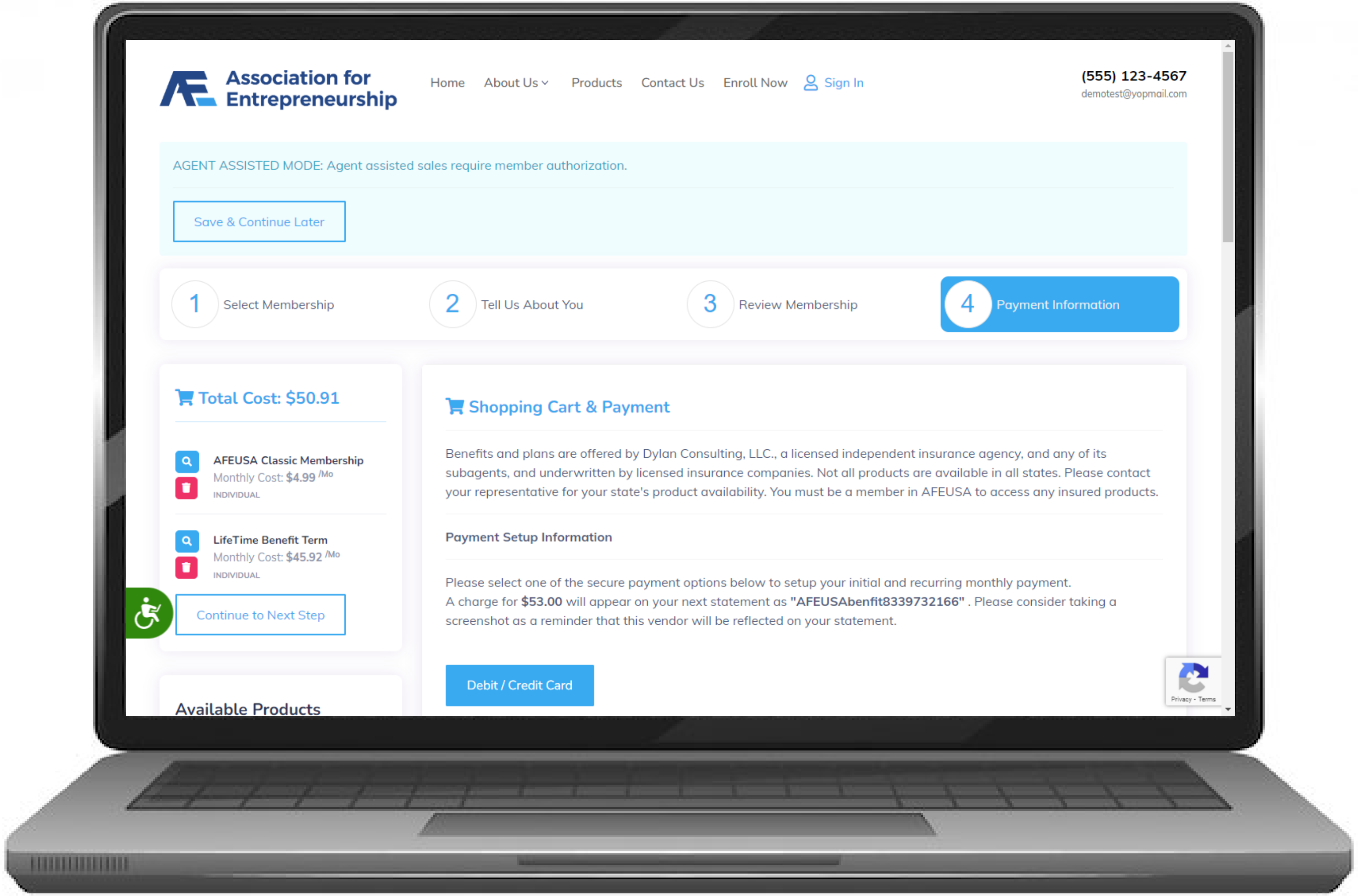
Payment Information

Step 4:

- Scroll Down



Association for Entrepreneurship

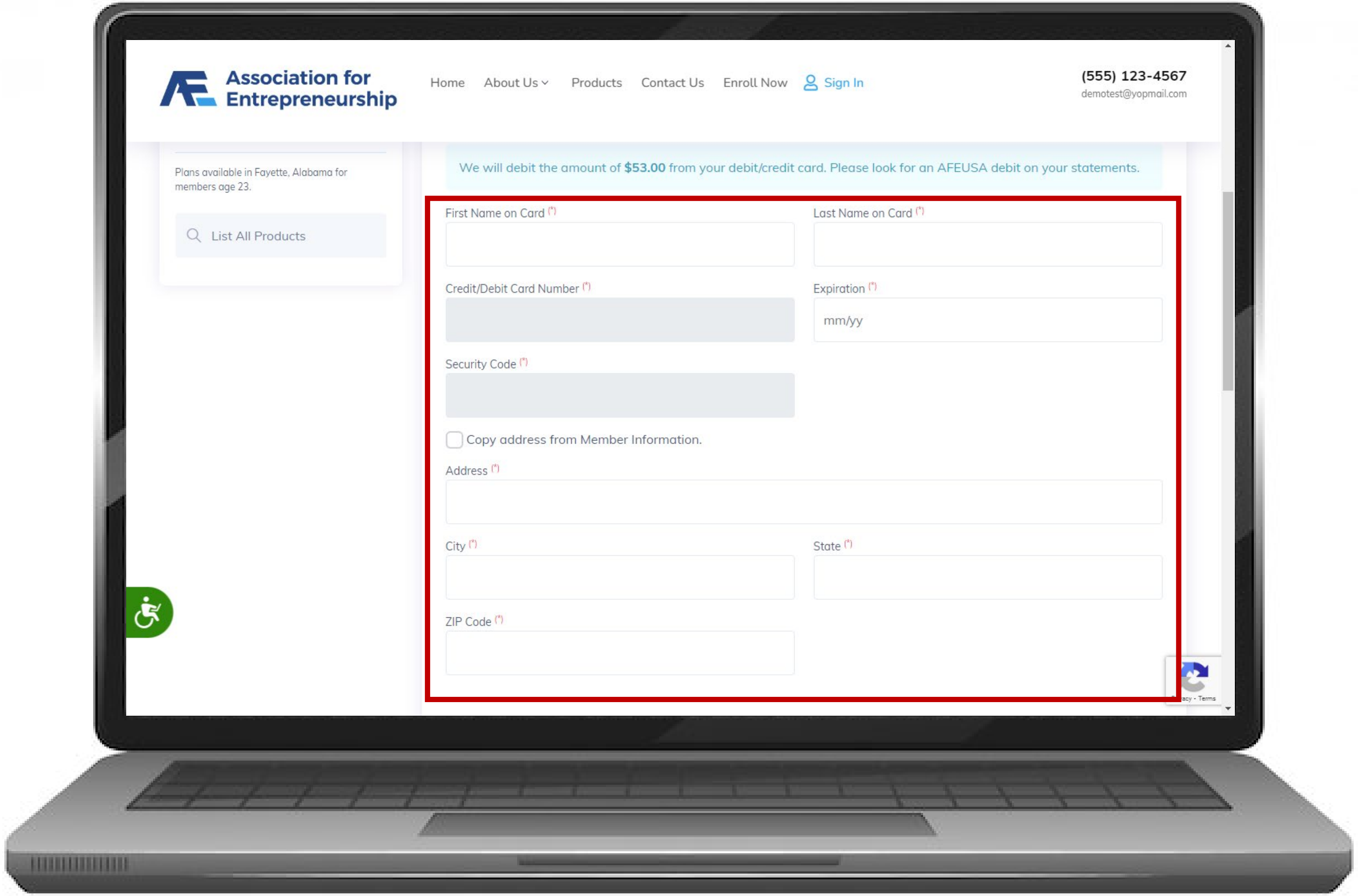
Payment Information

Step 4 Continued:

➢ ***Optional:*** *Complete the Form*

IMPORTANT TIP

Credit/Debit Card Number and Security Code fields are locked, they will must be completed by the client.



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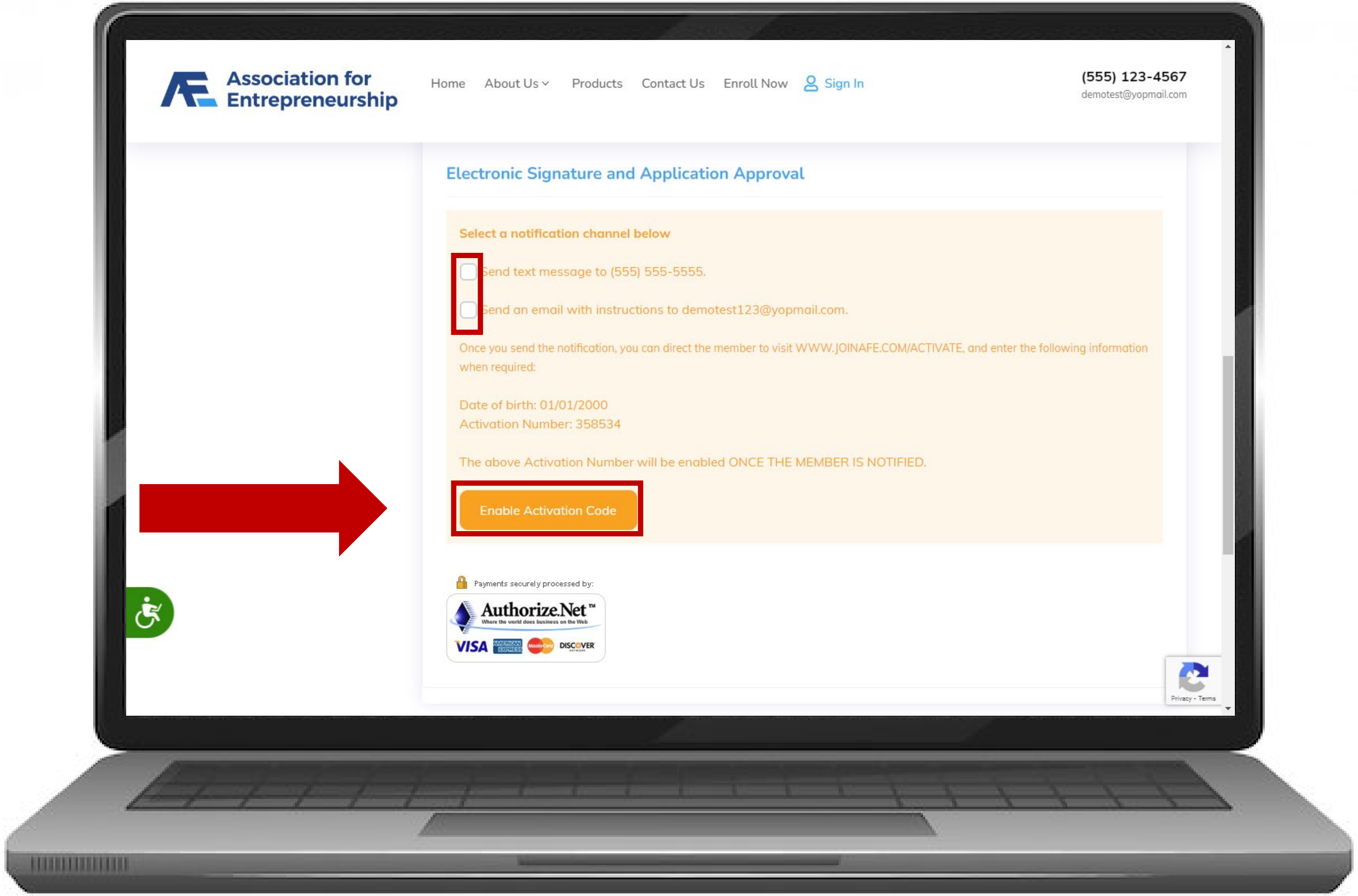
Payment Information

Step 4 Continued:

- Select If you want to Send a Text Message and/or an Email
- Click on Enable Activation Code

IMPORTANT TIP

You can find the Activation Number on the Desk (Members -> Saved Quotes)



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Part 3 - Pay

Client Completes

Association for Entrepreneurship

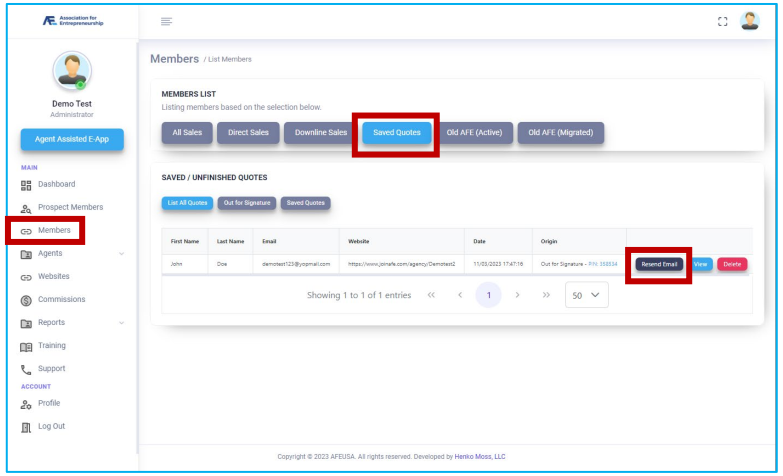
Client Receives Email and/or Text

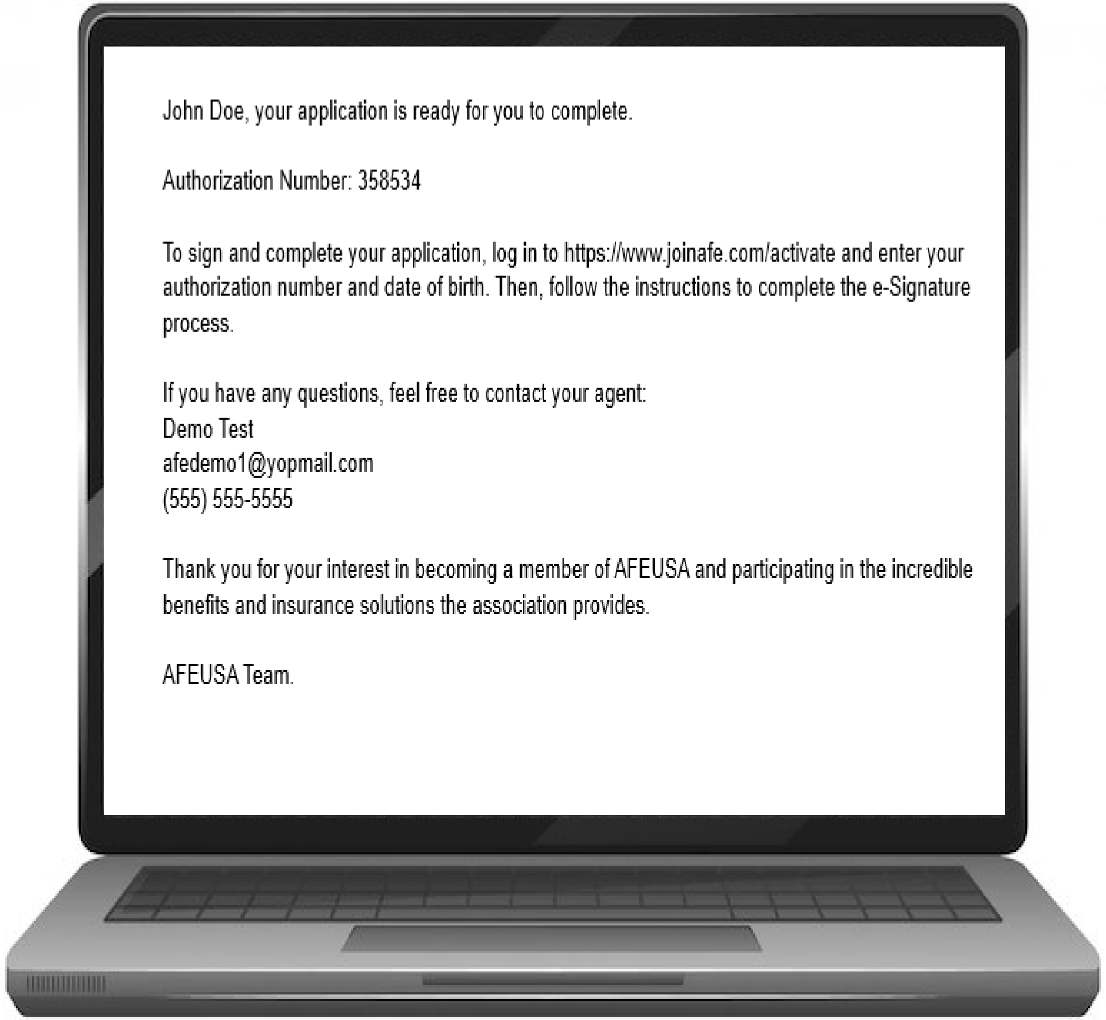
Step 4 Continued:

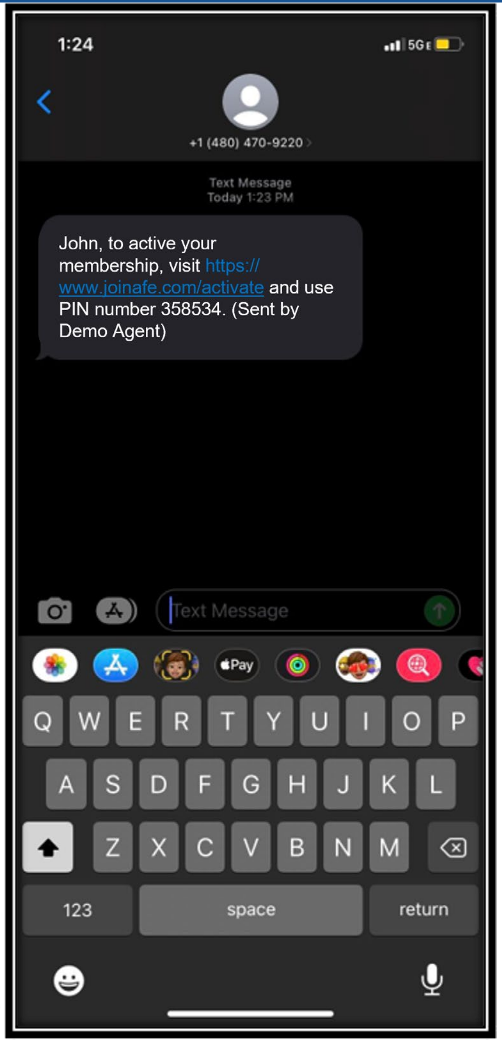
- www.joinafe.com/activate

IMPORTANT TIP

You can resend this email from the Desk (Members -> Saved Quotes)





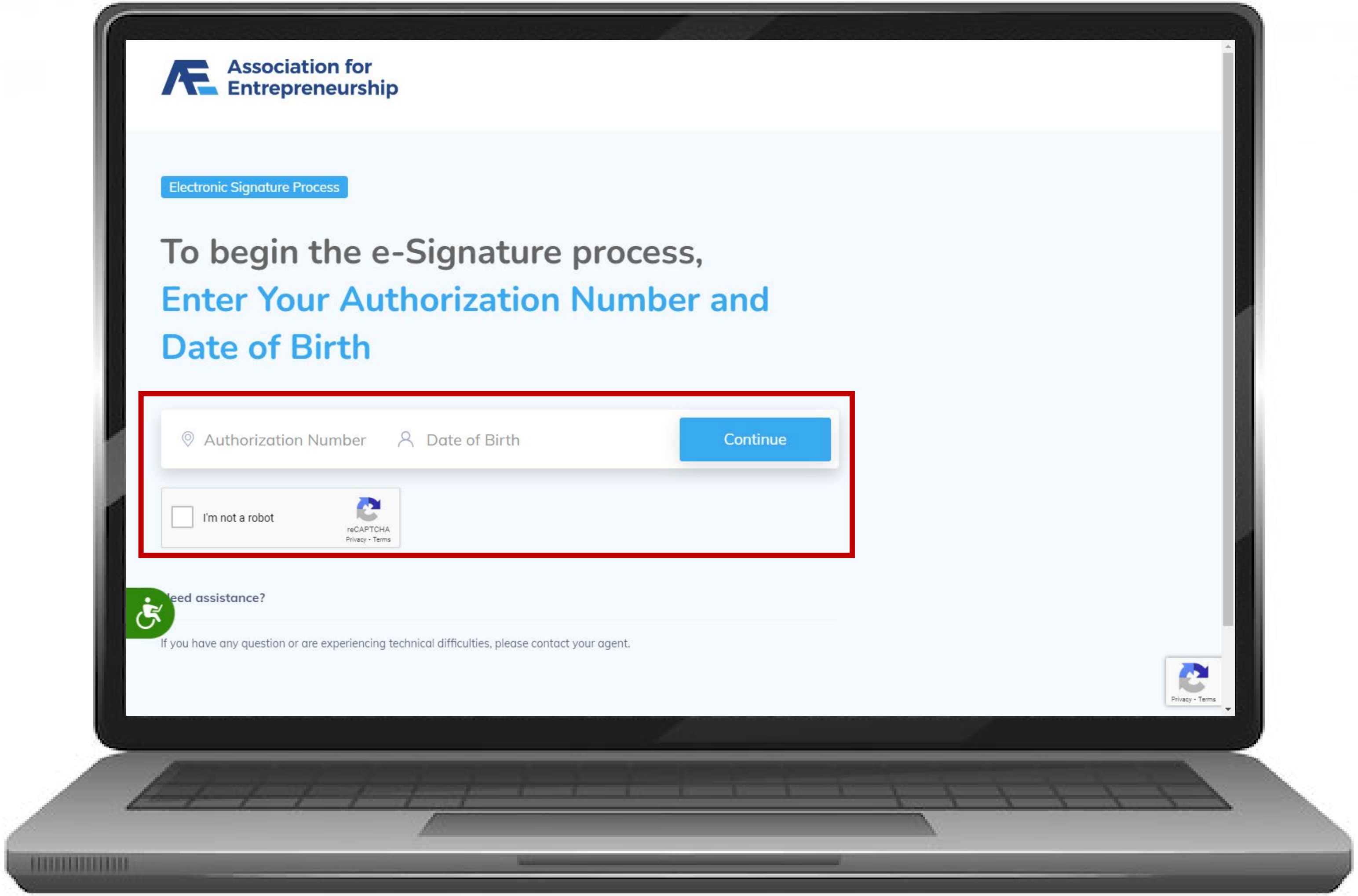


Association for Entrepreneurship

Authorization

www.joinafe.com/activate

- Authorization Number
- Date Of Birth
- Complete the reCAPTCHA
- Click on Continue



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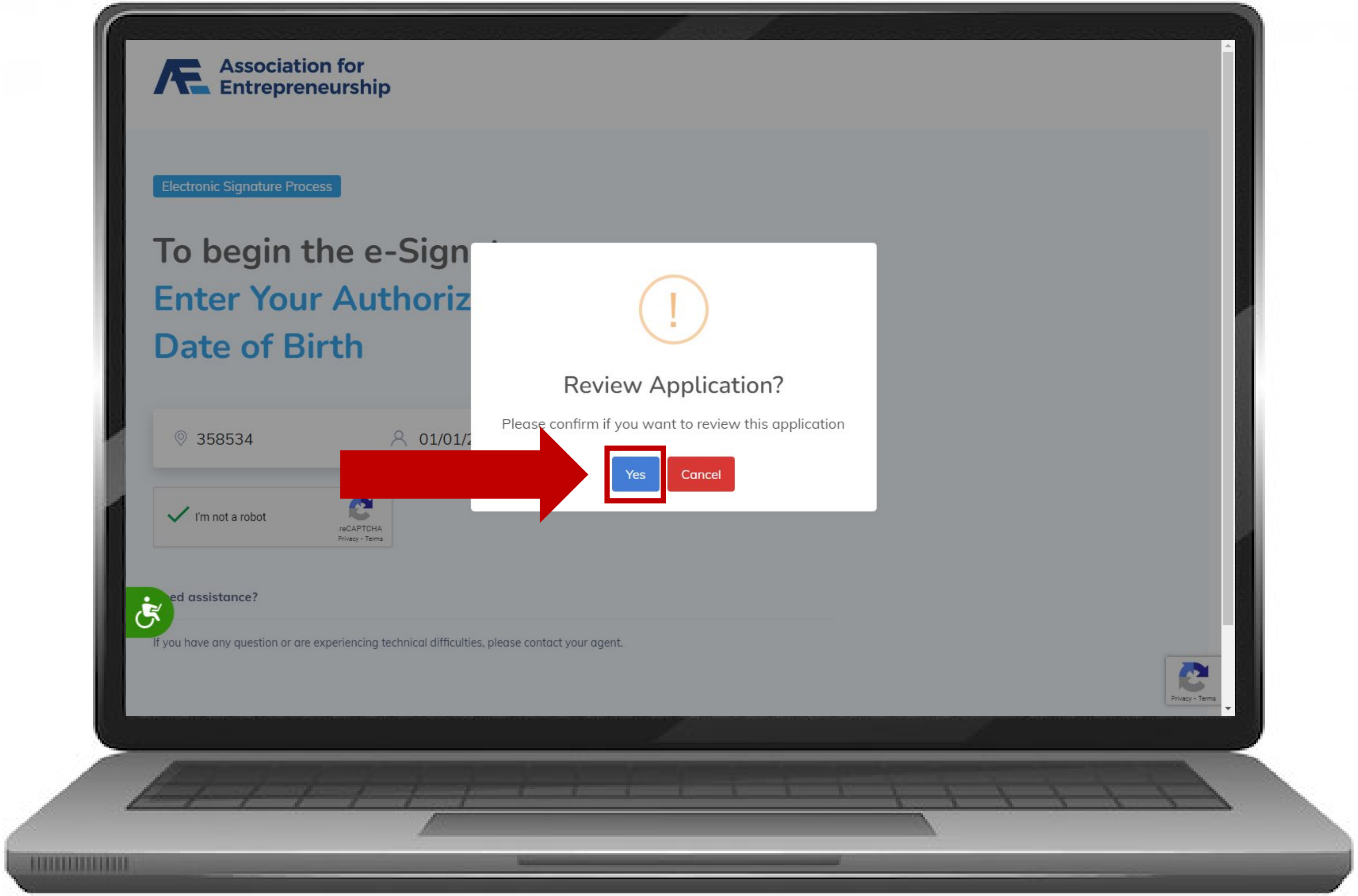
Authorization

www.joinafe.com/activate

- Click on Yes



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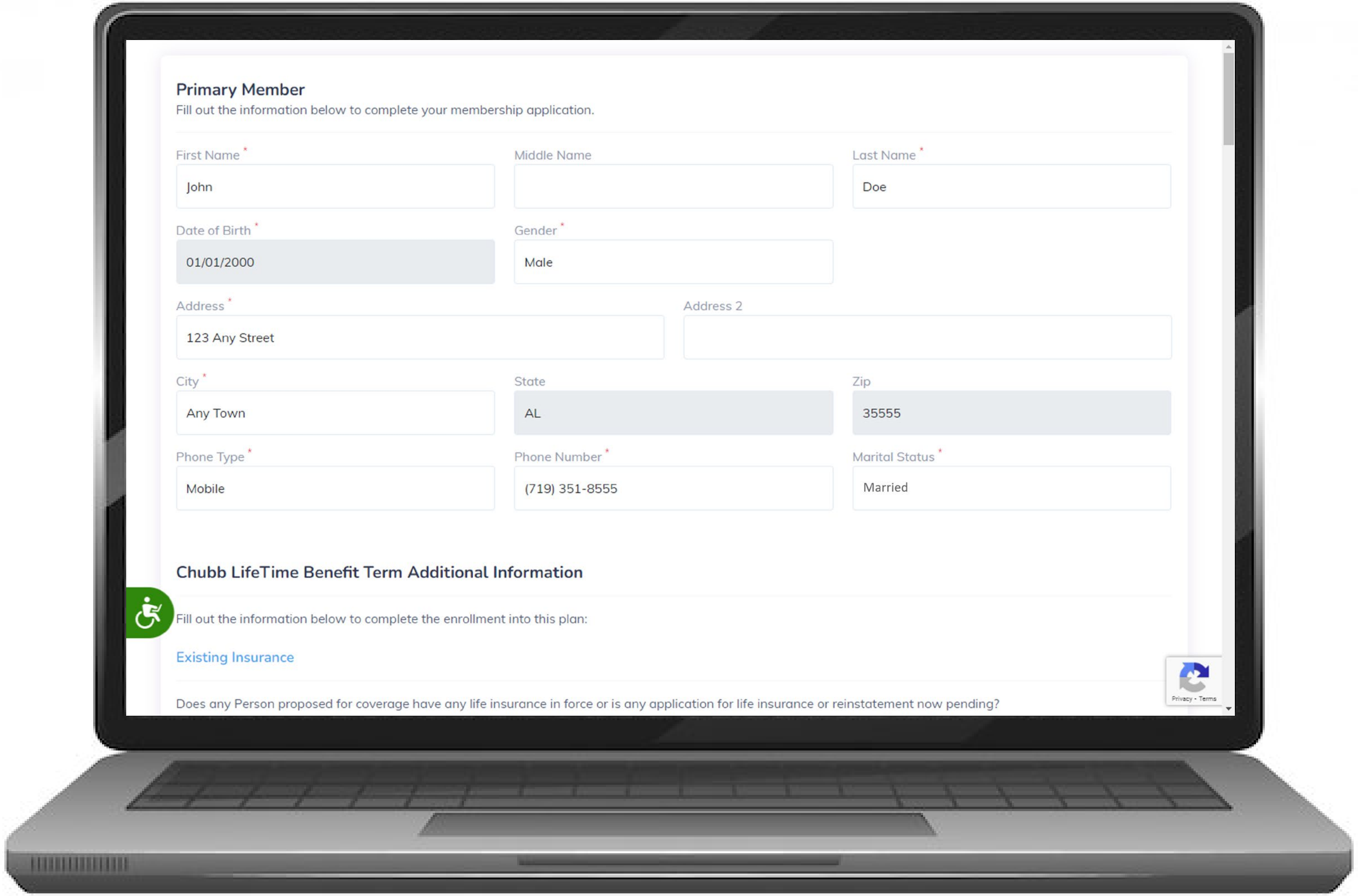
Payment

www.joinafe.com/activate

- Scroll Down to the Bottom
- Client can Review the Application



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Payment

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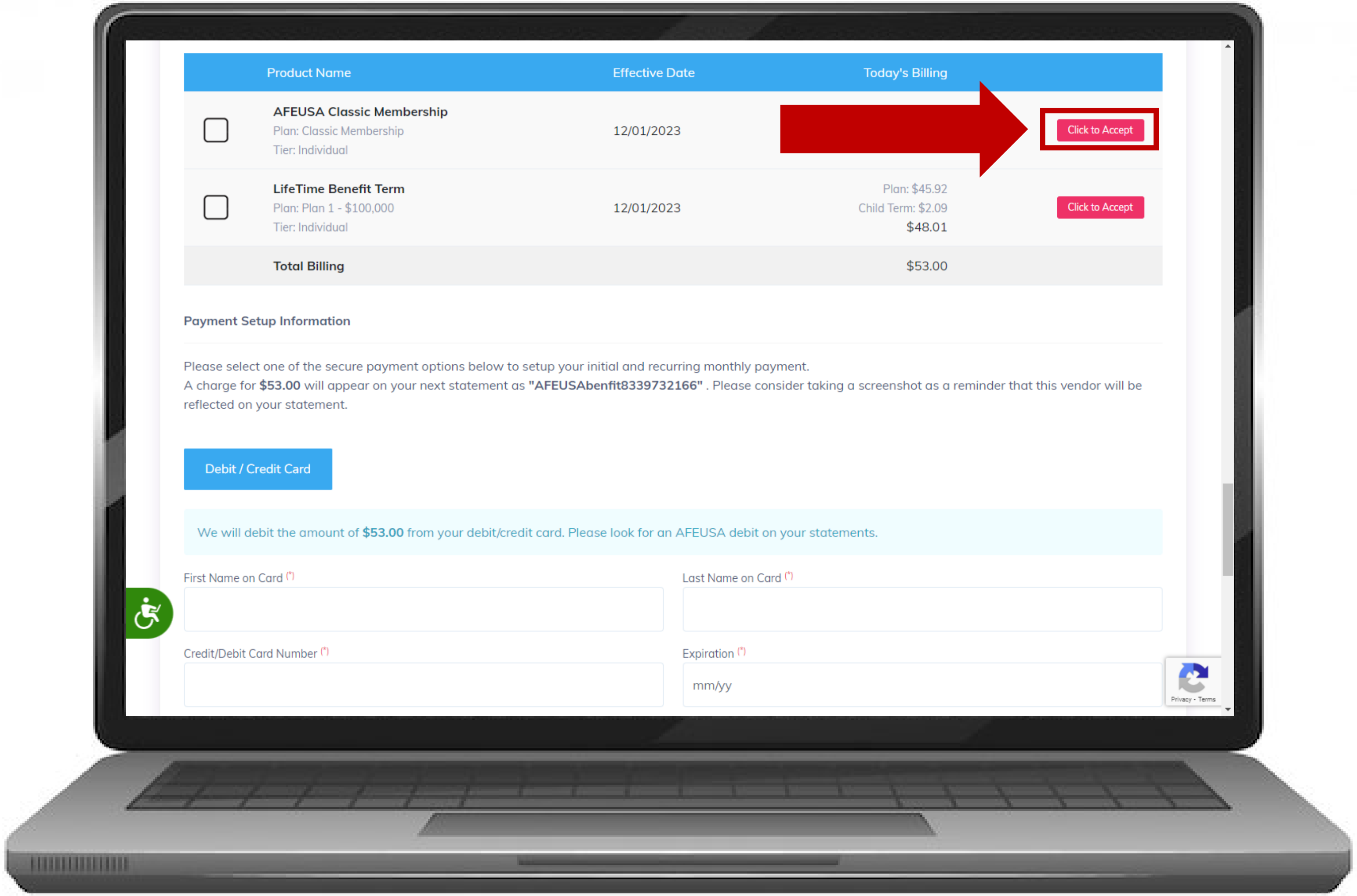
- Click on Click to Accept



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Payment

<u>www.joinafe.com/activate</u>

- Click on the Checkboxes
- Scroll Down there are more
- Click on Close Terms

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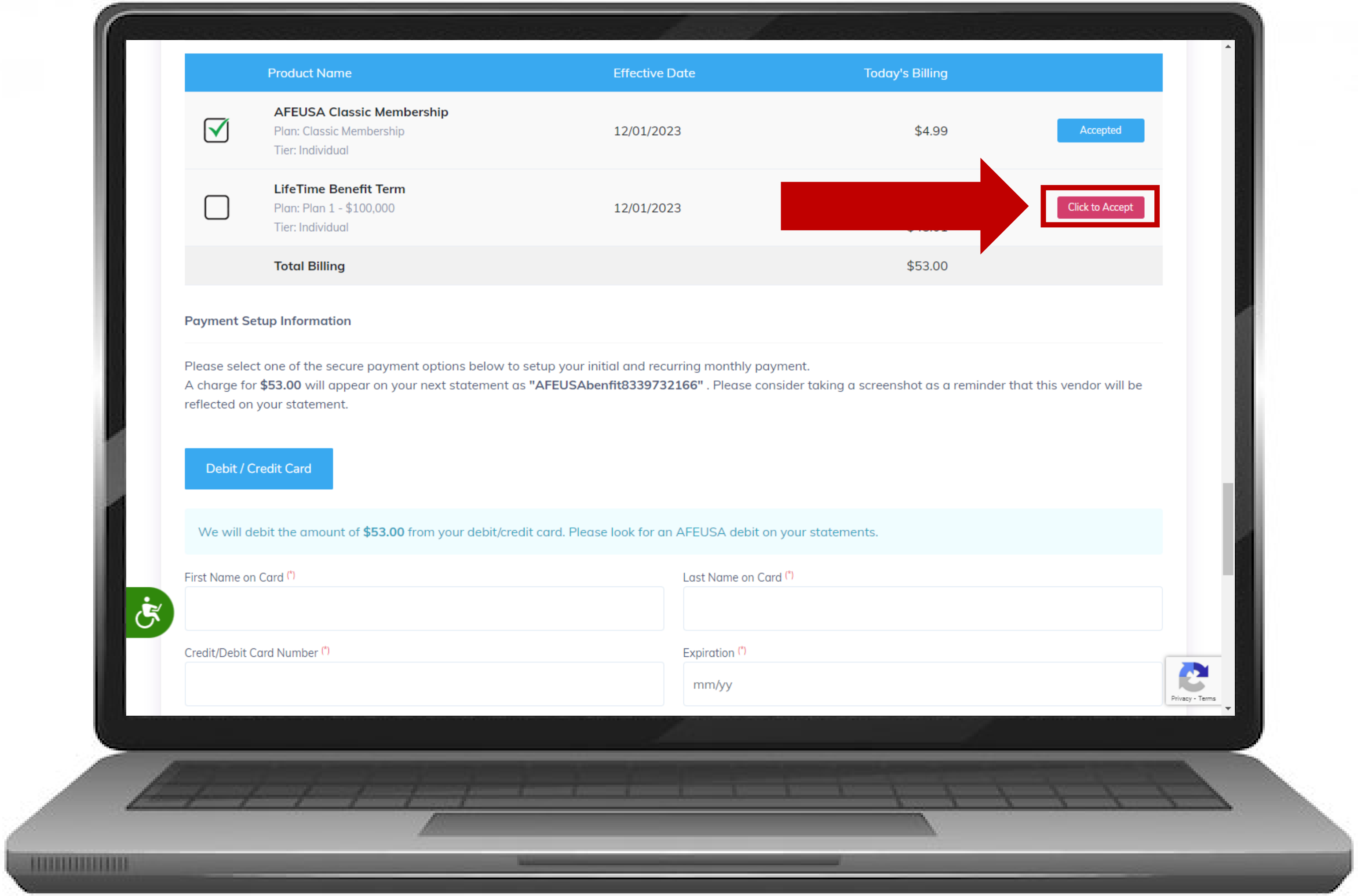
Payment

www.joinafe.com/activate

- Click on Click to Accept



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Payment

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- Click on the Checkbox
- Click on Close Terms
- Scroll Down

Association for Entrepreneurship

Payment

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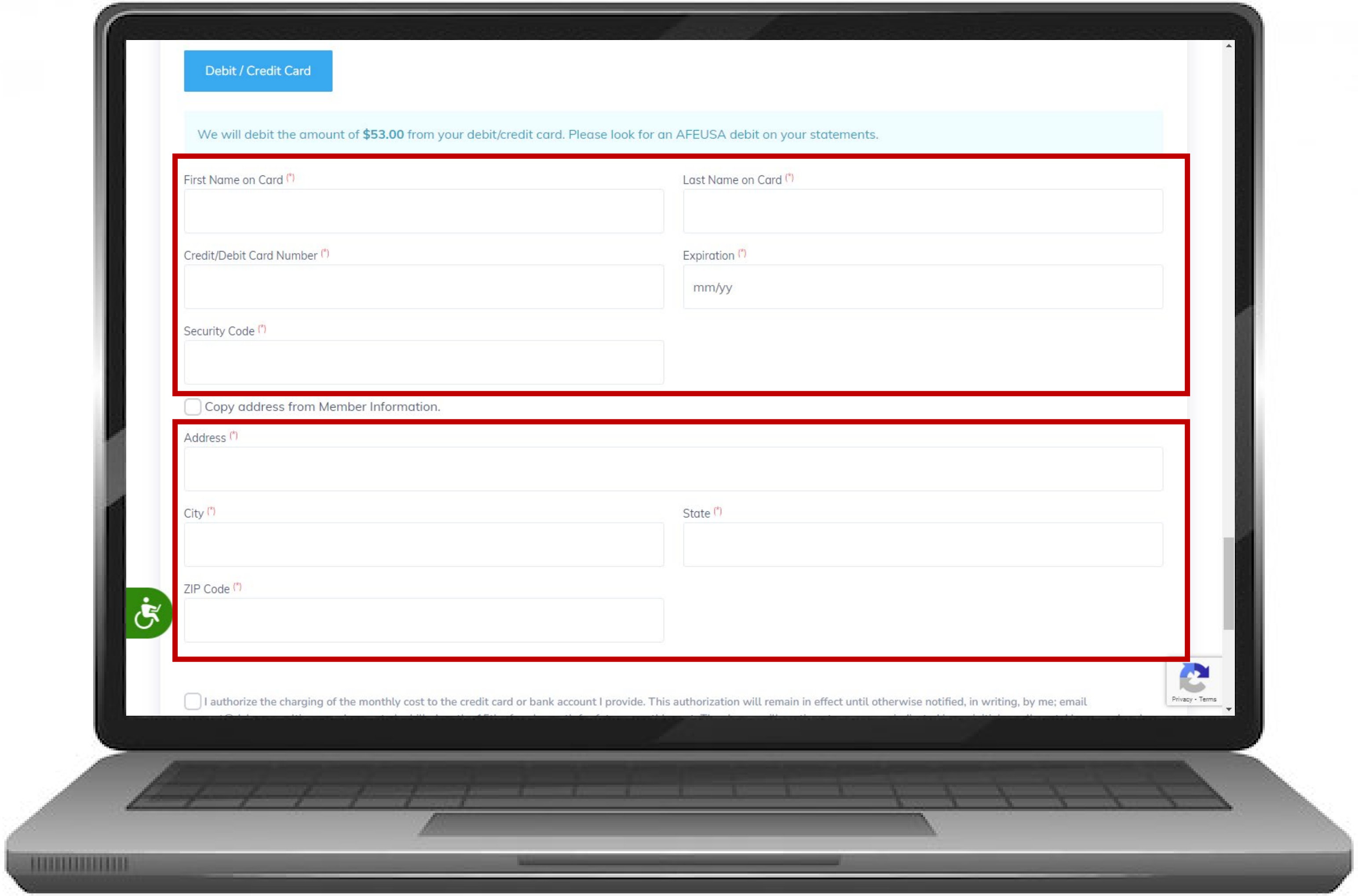
- Input Payment Info
- Input Billing Address
- Scroll Down



Association for Entrepreneurship

Payment

www.joinafe.com/activate

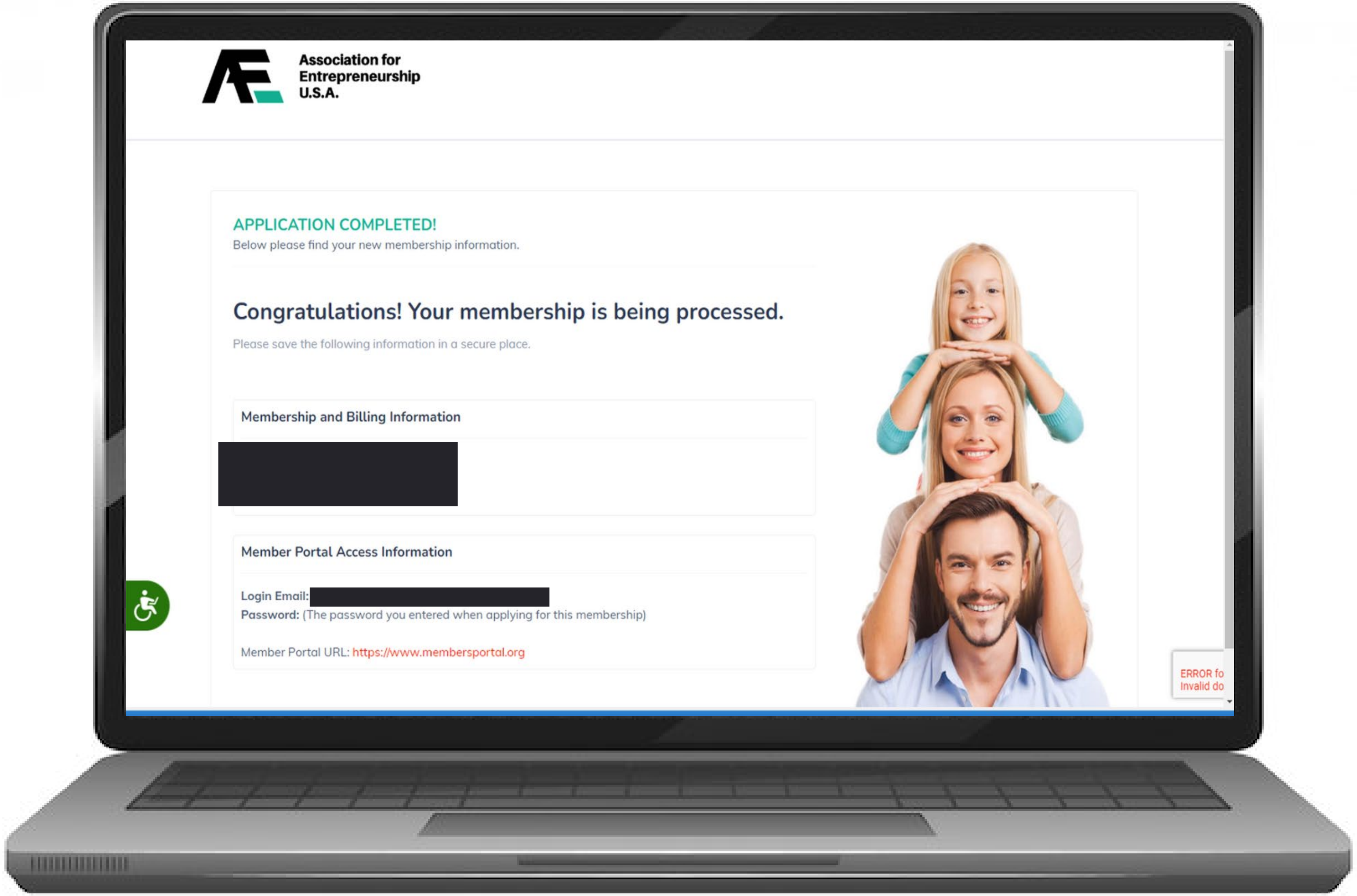
- Agree to the Terms – Bottom one is Optional
- Complete the reCAPTCHA
- Click on Buy Now

Association for Entrepreneurship

Payment

Congratulations!

- Member Portal
- www.membersportal.org



Association for Entrepreneurship

Thank you!

Questions?

651-395-4375

chubb@goldencareusa.com

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