

Pioneer American Contracting Checklist

Agent Name: _____ **Submit Date:** _____

RCTR Name: _____ **Upline Name:** _____

Agent, Please initial each page as you complete it to ensure all required pages are turned in.

Agent Initials	RCRT Initials	Required Pages:
		New Agent Contracting Set Up Sheet (Requires TSS signature)
		Producer History Page
		Complete Section 13 and sign in the top box (Requires TSS signature)
		Consumer Report Notification and Authorization
		W-9
		Compliance Policy-Statement of Understanding
		Annualization Plan Supplemental Agreement & ACH Deposit (Requires TSS Signature)
		Anti-Money Laundering Course Certificate of Completion
		Voided Check
		E&O Certificate
		Copy of State Insurance License(s)
		Written, hand signed, explanation for any "YES" answer on background questions
*** For Office Use Only ***		
	Verified	Updated Recruiter Log
	Scanned	Update File Maker Pro
	Submitted	Ready To File

Approval Date: _____ **Writing Number:** _____