



Auchel World
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美國奧淇國際金融



Grand Prospects Financial & Insurance Services

美國宏盛保險與理財

New Agent Guide

Company Contacts

Website: www.gpfis.com Phone Number: 1-800-340-1688 Fax Number: 1-626-820-6179	Social Media Facebook ID: AUCHELWORLD Instagram ID: AUCHELWORLD Wechat ID: 美国奥淇与宏盛 Youtube: 奥淇宏盛财富通	Headquarters - City of Industry 18631 E. Gale Ave., City of Industry, CA 91748 Phone Number: 626-820-6169 Branch: Arcadia, Boston, Chicago, Dallas, Great Neck, Guam, Irvine, San Francisco, San Jose, Hawaii, Houston, Maryland, New Jersey, New York, Oak Brook, Philadelphia, Seattle, Washington DC
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How You Start Your Contract - Contracting Department

Contracting Documents Needed - Signed Producer's Agreement - SureLC Producer Setup Packet (All pages completed and signed on pages 3, 5 and 8) - EFT Form, Void Check - Form W-9 - Current E&O (You can purchase it at https://www.napa-benefits.org/errors-and-omissions) - Copy of Insurance License & Driver's License - AML Certificate (If you have it, otherwise can be completed on WebCE or LIMRA)	Trainings	
	Before Appointment	Special
	AML Training - LIMRA: www.aml.limra.com - USER ID will be your National Producer Number (NPN) - PASSWORD will be your last name (In lower case) - WebCE: www.webce.com (If never get appointed by any carriers before, please go to WebCE to get the training completed)	1. Annuity Training (CA state: 8hr + 4hr refresh course, product training) 2. LTC Training (8hr) 3. NY state Training (Reged 187 training; Product Training)

Contracting team: Cheryl: cheryl@gpfis.com, Kenneth: Kenneth@gpfis.com

Who Will Support Your Production - Marketing Department

What They Can Help - Application - New Cases Quotation - Inforce Cases Customer Service - Training & Tech Support	Marketing Team			
	Ethan Wu ethan@gpfis.com Sam Wang sam@gpfis.com	Calvin Zhang calvin@gpfis.com Jane Huang jane@gpfis.com Jessie Liao jessieliao@gpfis.com	Gavin Ng gavin@gpfis.com Miko Yip miko@gpfis.com Jason Ye jason@gpfis.com	Roxanne Su roxanne@gpfis.com Jeffery Liu jeffery@gpfis.com Jett Lee jett@gpfis.com

Where To Go After You Have Application - New Business Department

What They Can Help - New Cases Process - Follow Up - Deliver Policy	Case Managers	
	Janny Yang: janny@gpfis.com Sunny Yan: sunny@gpfis.com	Crystal Cui: crystal@gpfis.com

How You Get Paid - Accounting Department

What They Can Help - Commission Payment & Statement - 1099 - Overwrite	Accounting Assistant Jessica Pan: jessica@gpfis.com
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P&C Department

What They Can Help - Medical -P&C -Commercial Insurance	Fanny Chu: gp@gpfis.com
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