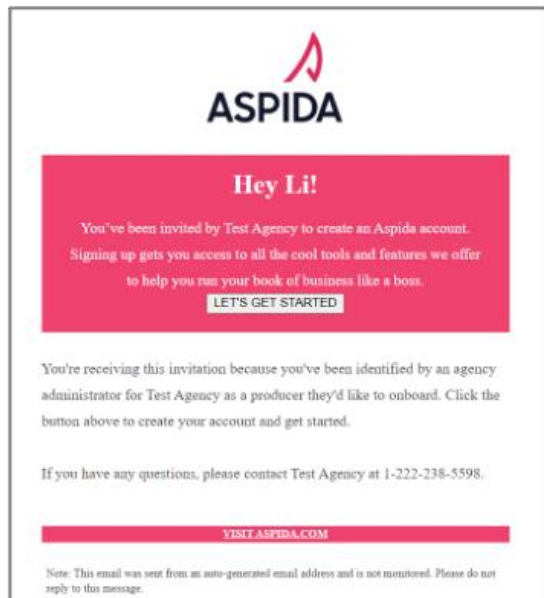


Let's get onboarding! Onboarding with Aspida is super simple, and can often be done within just a few minutes, thanks to slick integrations with NIPR and SureLC. Here's a quick guide to get you on your way.

ACCEPT YOUR INVITE

You will receive an email from Aspida when you are invited to join an agency's roster. Click Let's Get Started to continue.



You will be taken to the account creation screen. Enter your Social Security Number and Date of Birth, and then create your password.

The account creation screen for Aspida. At the top is the Aspida logo. Below it, the text reads: 'Hi Li! Let's create your account.' Underneath, it says: 'Your User ID will be your email address: lifan@mailinator.com'. Below this is a pink button with the text 'Please confirm some details about yourself'. The form contains four input fields: 'Social Security' with a placeholder 'XXXX-XX-XXXX', 'Date of Birth' with a placeholder 'MM/DD/YYYY' and a calendar icon, 'Create a Password' with a placeholder 'Must contain one uppercase, one lowercase, one number and special character and a minimum of 8 characters', and 'Confirm Password' with a placeholder 'Must match the password above'. Below the form is a pink button with the text 'PROCEED'.

Enter your mobile phone number to set up multi-factor authentication. Then, enter the code you receive via text to complete verification and proceed to the Aspida Portal.

Authentication Settings

Choose an authentication method each time you log in with a new browser.

☒ Send a one-time code to my phone

Phone Number

Format: XXX-XXX-XXXX

☐ Authenticator App

CREATE ACCOUNT

Two-step Verification

Thanks for keeping your account secure.
Check your mobile device: (xxx)xxx-0978

6-digit code

SUBMIT

COMPLETE REQUIREMENTS

The Aspida Portal will pull data from NIPR and SureLC and automatically mark any applicable requirements as complete. When you first enter the Aspida Portal, you will see the requirements page, which will display any outstanding requirements you need to complete before beginning your first eApplication. As you complete requirements, they will turn green to show they are completed or blue to note they are pending a final review from our team.

ASPIDA

Joe Levitt

REQUIREMENTS PROFILE HIERARCHY APPOINTMENTS

Completed:

Producer E&O Coverage Completed View/Update	Payment Information Completed Update	State Licenses View	Product Training Completed View
Anti-Money Laundering Training Expires 12/31/2023 View/Update	Annuity Suitability Training Completed 12/31/2023 View/Update	Producer Agreement with Aspida Completed View/Update	

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To complete a requirement, click on the tile and enter the required information.

The screenshot shows a user profile for Joe Levitt with tabs for REQUIREMENTS, PROFILE, HIERARCHY, and APPOINTMENTS. The REQUIREMENTS tab is active, showing a list of completed items: 'Producer E&O Coverage', 'Anti-Money Laundering Training', and 'Product Training'. A modal form titled 'Error and Omission Coverage' is open in the center. The form contains the following fields: 'E&O Carrier' (Accord), 'E&O Policy Number' (3408934590), 'Coverage Per Claim \$' (\$1,000,000), 'Policy Start Date' (01/01/2022), and 'Policy End Date' (01/01/2023). Below the fields is a disclaimer: 'By saving below, I certify that the above information is accurate. I acknowledge that providing false information to Aspidia may lead to the termination of my appointment, forfeiture of commissions, and any other remedies available to Aspidia.' At the bottom of the modal are 'CANCEL' and 'SAVE AND CLOSE' buttons.

Joe Levitt

REQUIREMENTS PROFILE HIERARCHY APPOINTMENTS

Completed:

Producer E&O Coverage Completed View/Update

Anti-Money Laundering Training Expires 12/31/2023 View/Update

Product Training Completed View

Error and Omission Coverage

E&O Carrier: Accord

E&O Policy Number: 3408934590

Coverage Per Claim \$: \$1,000,000

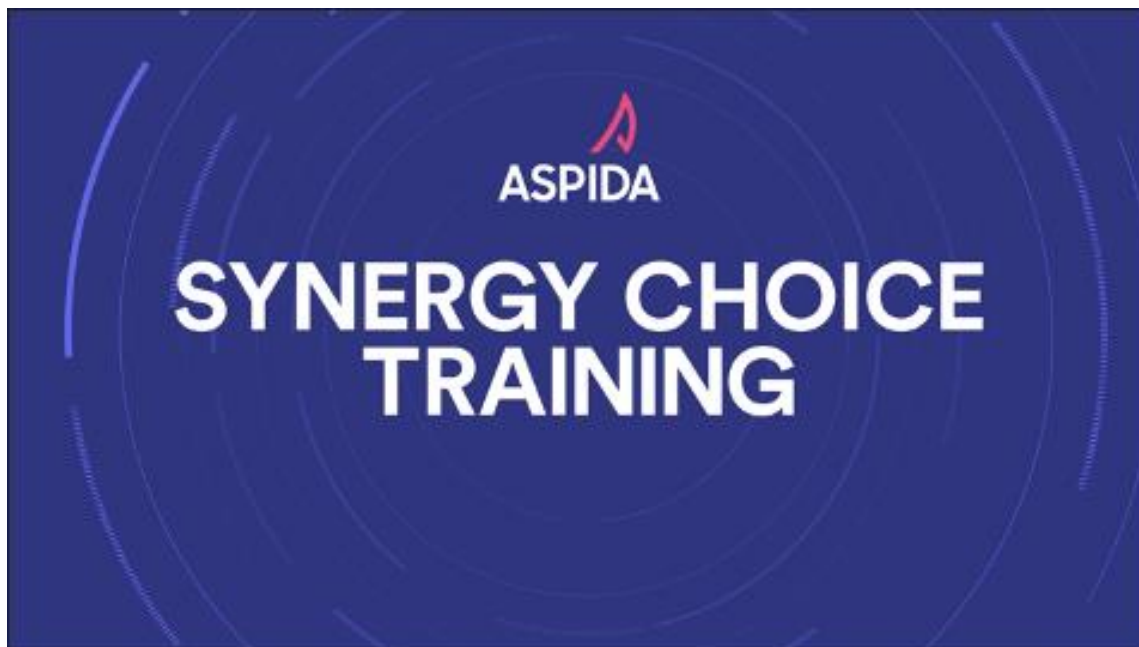
Policy Start Date: 01/01/2022

Policy End Date: 01/01/2023

By saving below, I certify that the above information is accurate. I acknowledge that providing false information to Aspidia may lead to the termination of my appointment, forfeiture of commissions, and any other remedies available to Aspidia.

CANCEL SAVE AND CLOSE

To complete product training, click the tile or navigate to the Training tab on the left-hand side. Click the training you wish to complete and click play. Make sure you watch all the way to the end or the training won't be marked as completed! (Don't worry, it's short!)



MANAGING YOUR PROFILE

You can edit your demographic and contact information by navigating to the Profile tab under My Profile, entering the updated information, and clicking save.

The screenshot shows the ASPIDA user interface for Joe Levitt. The left sidebar contains navigation links: Home, My Profile (selected), Reports, Book of Business, Training, Resource Center, Application, Illustration, and Log out. The main content area has tabs for REQUIREMENTS, PROFILE (selected), HIERARCHY, and APPOINTMENTS. Under the PROFILE tab, there is a 'Demographics' section with input fields for First Name (Joe), Last Name (LEVITT), Date of Birth (05/02/1964), Phone Number (910-524-0978), Phone Extension, and Email Address (joe.levitt@insafinotor.com). Below these are expandable sections for Business Address, Mailing Address, and Residential Address. A 'SAVE' button is located at the bottom right of the form.

You can also request appointments from the appointments tab. Only preappointment states are available to be requested. All other state appointments will be submitted automatically when you submit your first piece of business in a state.

The screenshot shows the ASPIDA user interface for Joe Levitt, with the APPOINTMENTS tab selected. The main content area is titled 'State Appointments' and includes a 'REQUEST APPOINTMENT' button. Below the title is a table with columns for State, County, Status, and Date Appointed. The table contains one row of data for GA, with a status of 'Approved' and a date of 05/02/2022. The footer of the table shows 'Rows per page: 10' and '1-1 of 1'.

State	County	Status	Date Appointed
GA	Not Applicable	Approved	05/02/2022