

Now that you've completed your profile setup in APEXA, and signed a contract with your AGA and with Carte Risk Management Inc., the MGA, in APEXA you are almost done... What you have to do now is request a contract with the desired Insurance Company within APEXA by following these steps:



- 1 Visit <http://www.apexa.ca/login>
 - 2 Enter your *Login Credentials* (email address and password)
 - 3 Click on *Login*
 - 4 On your main dashboard, click on the blue button that reads "*Request a New Contract*"
 - 5 From the list of options, choose "*I already have an AGA/MGA contract, I need a new Carrier contract*"
 - 6 Click on *Next*
 - 7 From the drop-down list of options, search for the **Insurance Company**
 - 8 From the drop-down list of options, search for **the name of your AGA**
- NOTE: If you require Life License Sponsorship from this carrier, ensure to check off the "I require Life License sponsorship" button*
- 9 Click on *Submit*
 - 10 **Your AGA** will then receive your request and approve it
 - 11 **Carte Risk Management Inc.** will now receive your request and approve it, and will proceed to creating and sending you a contract package for that **Insurance Company**
 - 12 You will receive an email from notifications@apexa.ca (please check your junk mail folder) with notification that your **Insurance Company** contract is ready for signing
 - 13 On your main dashboard, at the bottom, the pending **Insurance Company** contract will appear under "*Contracts Assigned to Me*"
 - 14 Click on the pending contract and follow the prompts to fill out any questions included in the contract and to sign electronically
 - 15 Once completed and signed, complete the contract by submitting it forward to the MGA, **Carte Risk Management Inc.**

Need APEXA system support? Call them at 1-855-294-2541 or send an email to support@apexa.ca



Carte Risk Management Inc. will then sign off on the Insurance Company contract and will submit it forward to the Insurance Company for signing and approval. Once the Insurance Company has approved your advisor contract, and assigned you a selling code, you will receive an email from notifications@apexa.ca (please check your junk mail folder) with confirmation, as well as an approval notification from the MGA's Contracting Department