

# 5 Step Get Started Process

## Fixed Insurance Contracts (through Broker's International)

- 1) Log in to e-forms by going to:
  - a. <https://appoint.cmsmenu.com/clients/brokersinternational/mainpage.asp>
    - i. First Time Users:
      1. Click **AGENT REGISTRATION** link and create a username and password
      2. Who referred you? **300 FINANCIAL** - to get access to 300 tools
- 2) Select the carrier's you will be writing business with
  - a. Answer **all** the questions for each carrier
- 3) Confirm the requested carriers by entering your self-selected PIN
- 4) Submit the required documents via the fax cover sheets provided at the end of the online questions.
  - a. Signature, E&O Declaration Page, Insurance license, voided check, ect.

**5) Contact 300 Financial to notify us that you have submitted your contracting online.**

- a. **CONTACT PERSON: Tricia Rud**
  - i. **Phone: 877-300-3011 x 218**
  - OR**
  - ii. **Email: Tricia@300Financial.com**

**Attention:** Failure to notify 300 Financial that your online paperwork has been completed could delay the processing of your contracting! Please contact us so that we can verify all paperwork has been completed.

## To Get Started with Eqis Capital (if applicable)

- 1) Complete the Eqis Capital Solicitor Agreement by clicking on the link below.  
[Eqis Enrollment Form](#)
- 2) Attach a **Voided Check**
- 3) Fax or mail signed paperwork to:  
Eqis Capital  
17W220 22nd St, Ste 330  
Oakbrook Terrace, IL 60181  
Fax: 630-929-3024
- 4) To view Eqis Capital for due diligence, click the link below. You will be provided sample statements, performance, manager fact sheets, and sample proposals.  
[www.eqiscapital.com](http://www.eqiscapital.com)  
(User ID: eqisdd and Password: eqisdd)