

Agent Sign Up and Training

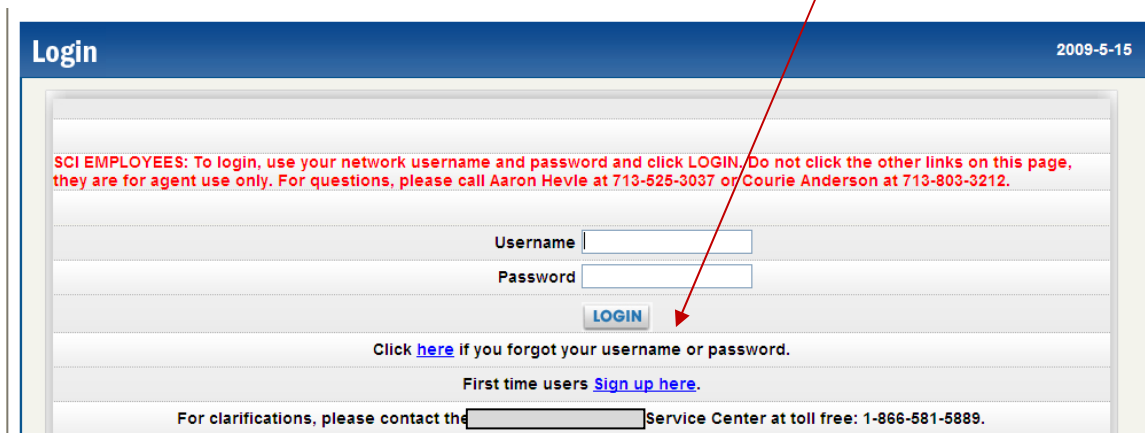
Below is the step-by-step process for creating a Dignity Planning agent account and completing the online training. If you have any questions about this process, or the training, please contact the Dignity Planning account management team at 866-349-6370.

Key Points

- You **MUST** complete training (through the online training modules, a live training session or an agent training webinar) before you can use the Dignity Planning tool.
- Once you complete the training, you can begin using the paper planning kits or your appropriate partner website while you wait for your account to be activated.
- There are two versions of the website—the live “consumer” site and the administrative site
 - The partner consumer site is where a consumer goes to create a plan online. This site also has a streaming copy of the sales video.
 - The administrative site is used purely for reporting and tracking purposes and is accessible only to agents and administrators of an insurance partner.
 - To access the administrative site, go to www.partnerplanning.com/signup, where “www.partnerplanning.com” is your consumer site. For example, if your partner consumer site is www.MyEndofLifePlan.com, then your administrative site is www.MyEndofLifePlan.com/signup.

To Register for an Agent Account

1. Go to your partner administrative site
2. Click on “First Time Users Sign Up Here” at the bottom of the screen



The screenshot shows a login page with a blue header containing the word "Login" and the date "2009-5-15". Below the header is a red warning message: "SCI EMPLOYEES: To login, use your network username and password and click LOGIN. Do not click the other links on this page, they are for agent use only. For questions, please call Aaron Hevle at 713-525-3037 or Courie Anderson at 713-803-3212." The main content area contains two input fields: "Username" and "Password", followed by a blue "LOGIN" button. A red arrow points from the text in step 2 of the registration instructions to the "LOGIN" button. Below the input fields, there is a link: "Click [here](#) if you forgot your username or password." At the bottom, it says "First time users [Sign up here](#)." and "For clarifications, please contact the [redacted] Service Center at toll free: 1-866-581-5889."

3. Complete the Agent Information Form and click the “Sign Up” button at the bottom.

Sign Up 2009-5-1

I am a new user.
 I already have an account with Dignity Planning, please link my account information

*Username:
Please enter a new username and password that are easy for you to remember. If you would like to keep the assigned username and password, please enter the same here

*Password:
Password must contain at least 7 characters and following 2 rules: 1 numeric and 1 alphabet

*Last Name:

*First Name:

Address 1:

Address 2:

City:

Country: U.S.A.

State: Alabama

Zip:

Birthdate (mm/dd/yyyy):

Phone:

Fax:

*Email:

*Password Recovery Secret Question:

*Answer:

BEFORE COMPLETING THE NEXT STEP, YOU MUST TURN OFF POP-UP BLOCKERS ON BOTH YOUR BROWSER (INTERNET EXPLORER, SAFARI, FIREFOX, ETC) AND ANY INSTALLED TOOLBARS. IF YOU USE MULTIPLE TOOLBARS, I.E. MSN, YAHOO, GOOGLE, ETC., YOU WILL NEED TO TURN OFF POP-UP BLOCKER ON ALL TOOLBARS.

4. Complete the 5 training modules and fill out the training acknowledgement that is Module 6. This should take you about 30 minutes.
5. Once you have completed all training modules and completely filled out the training acknowledgment form, a notification will be sent to your account administrator.
6. Once the administrator verifies receipt of your training acknowledgement, assigns the proper agent ID code, user role, and security level, your account will be activated. Depending on the administrator, this process can take 2-3 business days.
7. Once the account administrator has activated your account, you will be sent an email notification with a link to sign in and create your permanent username and password.

If you have any questions or problems while completing the agent sign up process, please call our agent resource line at 866-349-6370.