

beam® New Agent Appointment Process

Getting appointed with Beam is easy!

No manual paperwork to fill out!

We'll reach out to you!

After you've sold your first Beam case you will be introduced to the Beam Appointments Team via the agent's email address listed on the Beam Group Application. An assigned appointment rep will be dedicated to you throughout the process to provide instructions, or answer questions that may come up.

The Appointment paperwork is fully electronic and you'll receive paperwork via DocuSign. You will need to provide copies of your applicable state licenses and can do so by responding to the Appointment rep's intro email.

Once you complete the process, we will review the paperwork and complete your appointment, notifying you when completed!

FAQs

1. **How long does the process usually take?**

Your dedicated appointment rep will be in contact within 48 hours of the introduction. Once we have received all required paperwork back it is submitted for final review. This process usually takes about 1-2 weeks.

2. **What do I need to provide to Beam?**

A full packet is sent to you through DocuSign which walks you through the contracting paperwork. You'll also need to provide copies of your licenses for each state you're requesting appointment.

3. **Does every agent in our agency who sells Beam, need to be appointed?**

Typically, we only require one agent per agency to be appointed. All other agents will be able to write under this appointment. This paperwork acts to appoint both the agency & agent. Separate paperwork is not needed for additional insurance representatives. Beam will make payment to the agency.

4. **What states can we get appointed in?**

'All States' or 'Nationwide' appointments do not apply as Beam is not yet in all states. Please list the applicable states individually.

5. **Does Beam require ACH?**

Beam only offers ACH payment. You'll receive an itemized Broker Commission Statement via email which outlines all payment details and the amount to be paid.