HOW TO DO BUSINESS GUIDE
SUREBRIDGE

Customer Service Number: 888-797-4447

Producer Support Email: producersupport@surebridgeinsurance.com

Customer Care Mailing Address:

The Chesapeake Life Insurance Company

Customer Care Center

PO Box 982015

North Richland Hills, TX 76182-2015

First Time Users:

1. You will receive a welcome email that contains your Agent ID, username, and temporary password.
2. Go to: https://www.surebridgeinsurance.com/
3. Click “Agents” then “Resources.”
4. Scroll down and click “Log In” under “Producer Portal.”
5. Once you are logged in with your username and temporary password, you will be prompted to create a new one.

Multifactor Authentication:

1. As of October 1, 2020, after your initial sign in to the Broker Portal, you will be required to verify your identity by providing a login code that will be sent to you via choice of text message, email, or automated phone call. Phone numbers and/or email addresses must match what is stored on you’re my Profile page on the Broker Portal.
2. After you log in using your username and password, select your preferred method for receiving your login code and click “Verify.”
3. Enter your login code and click “Remember this computer or device” to allow future logins with MFA. Click “Validate.”

Mandatory Training Courses:

1. Once you are logged in with your **new** password, you will be taken to a required training course. This will take about 20 minutes.

2. Once that is complete, you will have full access to your Broker Portal.

Set Up Direct Deposit:

1. Once you are logged in to your portal, click "Direct Deposit."
2. Here you will be able to add banking information and set up your payment preferences.
3. For security reasons, will you need to enter the same username and password used to access the Broker Portal and the last 5 digits of your SSN.

To Check Commissions:

1. Once you are logged into your agent portal, click "My Account" in the bottom right corner. This will take you to a separate tab.
2. Click "Commissions" across the top.
3. Click "Commission Statements" from the drop-down menu.
4. Here you will be able to search your commissions by name or date.

To Check Book of Business:

1. Once you are logged into your agent portal, click "Reports" across the top bar.
2. Here you will have access to claims status reports, policy information reports, as well as have access to a report reference guide.

Other Helpful Tools and Resources:

- Under "Tools," you will have access to product brochures, forms, misc. documents, and Medicare handbooks.
- Under "Training," you will have access to SureBridge University, Point of Sale tool videos, and other training documents.

For questions please call Senior Marketing Specialist at 800-689-2800.