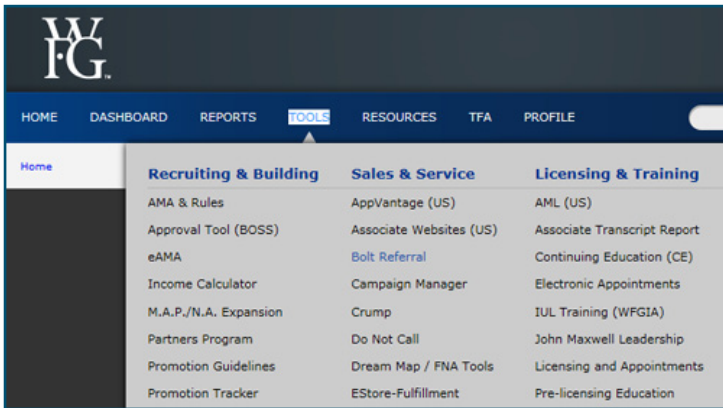


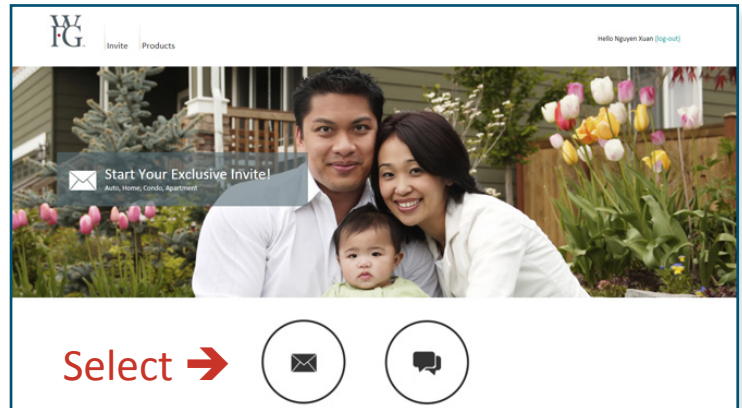
HOW TO: BOLT REFERRAL



1 To start a referral, simply login to your WFG portal [www.mywfg.com] and select **TOOLS** and **Bolt Referral**.



2 You and your credentials will then be ported to the referral mini-site. Select “Invite” or click the envelope icon to input your client’s details.



3 Next, fill out the form fields with your client’s information. Click “Next” to see an address dialogue tool that will confirm the address.

Enter Client Details

Our Products Page

1 Details 2 Products 3 Confirmation

Please fill in all of the following details:

First Name: Last Name: Physical Address: City: State: Zip:

Phone Number:

Email Address:

[Next >](#)

4 With the address confirmed, you will be brought to the products page to select the property insurance your client has interest in.

Select Products

Our Products Page

1 Details 2 Products 3 Confirmation

Please choose one or more products

☒ Auto Insurance

Currently Insured? Yes No

Expiration Date:

Current Premium:

☒ Homeowners/Condos/Apartments

Homeowners/Condos/Apartments

Condos

Apartments

Currently Insured? Yes No

Expiration Date:

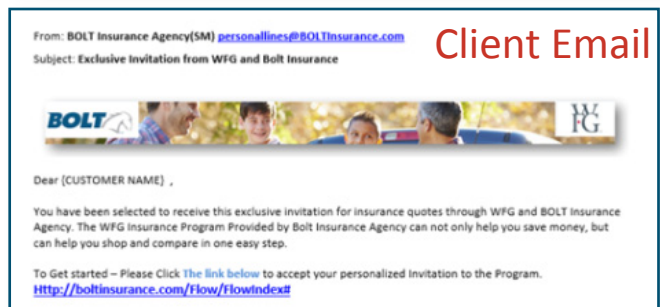
Current Premium:

☐ Flood Insurance

[< Back](#) [Submit >](#)

5 Upon clicking Submit, your client will be sent an email “invitation” with a link to their pre-filled application. At this point, you will be able to track progress and re-send invites if necessary.

When the application is complete, BOLT works with your client to bind the transaction and process payment.



BOLT Insurance Agency delivers a multi-choice platform for consumers and small business owners to obtain business, auto, or homeowners insurance from a host of top-rated carriers using an Independent Choice Model where rates and coverages are compared and presented in near real-time, saving clients research time and the risk of buying insurance at above-market rates. BOLT maintains this platform with superior customer service to ensure clients receive the most efficient experience possible.



Frequently Asked Questions:

Q. How do I send an invite?

A. You can send invite by logging into mywfg.com, enter your WFGcredentials, select Tools from the menu bar and click on BOLT Referral.

Q. What types of quotes will BOLT provide?

A. Start inviting customers for their Automobile and Property insurance needs. Bolt also offers quotes for the following products;

* Auto * Boats * Home * Motorcycle * Pets * Umbrella

Q. When can I start sending invites?

A. You can start sending invitations to your customers immediately.

Q. Can I bulk upload a customer list?

A. There is not an option to bulk upload customer lists. The program is intended for a discussion to occur asking your customer if they are interested in obtaining a quote from BOLT Insurance.

Q. What will my customer receive once I send an invite?

A. Your customers will receive an email that provides a link to access BOLT quoting system.

Q. Can I complete the quote on behalf of my customer?

A. Because you are not a P&C licensed representative of BOLT, your customer must be the one to access the BOLT quoting system and complete the required information.

Q. How will I know if the customer completed a quote?

A. You will be able to track your customer's status by Selecting Progress from the home page of the invite site.

Q. How much money will I receive?

A. You will receive a referral fee for each policy written. To access the Bolt Payout schedule on www.mywfg.com go to the Tools tab and click on the link to the Product Guide. The payout schedule is located under Bolt Insurance.

Q. Will the written policiescount toward any incentives?

A. Yes. Points will be awarded based on the total referral fee payout to the field. WFG uses points to determine promotion qualification, for contests and recognition.