



WFG-TFA Agent E&O Enrollment Bluestream Digital Experience

July 9th, 2020

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Landing Page – Link in enrollment email will direct agents to the landing page page where they can learn more about E&O coverage and start the enrollment journey

MARSH | WFG | TRANSAMERICA[®]
FINANCIAL ADVISORS, INC.

Get your Errors & Omissions required coverage today

Enrollment deadline: July 31, 2020

ENROLL NOW

Marsh Small Business Insurance Has You Covered

Coverage That Meets Your Business Needs

Specialized Errors & Omissions coverage designed for WFG-TFA agents. [Learn more](#)

Quick and Convenient Online Enrollment

Complete your enrollment in minutes. [Enroll now](#)

Backed by Expertise

Marsh is the industry leader in comprehensive insurance solutions for small businesses. [Learn more](#)

Eligibility Verification – Eligibility check is performed against agent ID + email address in order for the agent to proceed to the quote page

The screenshot shows the MARSH website's 'Get started' page. At the top left is the MARSH logo, and at the top right is the contact information: 'Have questions? Call us at (800) 380-0451'. Below this is a dark navigation bar with a progress indicator showing five steps: GET STARTED, VERIFY INFO, REVIEW QUOTE, CHECKOUT, and CONFIRMATION. The 'GET STARTED' step is currently active. The main content area is a white card with a blue header 'Get started'. Below the header, there is a text prompt: 'First, let's confirm your eligibility status. Enter your agent information below.' This is followed by two input fields: 'Agent ID' and 'Email', each with a placeholder text 'Enter your Agent ID' and 'Enter your email address' respectively. A blue 'Continue' button is positioned at the bottom of the card. The footer contains copyright information and links to 'Terms of Use', 'Privacy Policy', 'About Us', and 'Contact Us'.

MARSH

Have questions? Call us at (800) 380-0451

GET STARTED VERIFY INFO REVIEW QUOTE CHECKOUT CONFIRMATION

Get started

First, let's confirm your eligibility status. Enter your agent information below.

Agent ID ⓘ

Email ⓘ

Continue

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Verify Information – If agent passes the eligibility check, their contact details will be displayed for them to review (this information is non-editable)

The screenshot shows a web interface for MARSH. At the top left is the MARSH logo. At the top right is the text "Have questions? Call us at (800) 380-0451". Below this is a dark navigation bar with five steps: GET STARTED, VERIFY INFO, REVIEW QUOTE, CHECKOUT, and CONFIRMATION. The "VERIFY INFO" step is highlighted with a blue line and a blue circle. Below the navigation bar is a white modal box with a blue header "Verify your information". The modal contains a paragraph of text, a list of contact details, a disclaimer, and a "Continue" button.

MARSH

Have questions? Call us at (800) 380-0451

GET STARTED VERIFY INFO REVIEW QUOTE CHECKOUT CONFIRMATION

Verify your information

Next, review and verify your contact details. Should you need to update this information, you can easily do so by visiting mywfg.com after you complete your enrollment.

Name	TEST PERFORMANCE5062
Address	5062 Test Lane
City	URBANDALE
State	IA
ZIP Code	50322

By clicking continue you confirm that you agree to the Marsh [Terms of Use](#) and [Privacy Policy](#).

Continue



Have questions? Call us at (800) 380-0451

GET STARTED

VERIFY INFO

REVIEW QUOTE

CHECKOUT

CONFIRMATION

Review your customized quote

You are one step closer to obtaining coverage to protect your business! Review details below.

Errors & Omissions

\$520.00/policy term

Policy Term: 08/01/2020 - 08/01/2021

Details	Amount
Limit of Liability [?]	\$1,250,000
Aggregate Limit of Liability [?]	\$3,000,000
Retention [?]	Variable

This insurance coverage is written on a claims made and reported basis, which means that in order to be covered, a claim must be presented to the Insured and reported to the Insurer, in writing, during the current policy period, or within 30 days after the expiration of the policy. Errors and Omissions insurance coverage is underwritten by U.S. Specialty Insurance Company or Houston Casualty Company (in Puerto Rico).

Continue



Have questions? Call us at (800) 380-0451

GET STARTED

VERIFY INFO

REVIEW QUOTE

CHECKOUT

CONFIRMATION

Checkout

Purchase your coverage today! Simply select your preferred payment plan and provide your payment details. You can review your Errors & Omissions details on the previous page.

Select your payment plan

Pay in Full

1 Payment of \$520.00

Pay in Installments

4 Payment(s) of \$130.00
No installment fees

Today's Total

\$520.00

[Continue to Payment](#)



Have questions? Call us at (800) 380-0451

GET STARTED VERIFY INFO REVIEW QUOTE CHECKOUT CONFIRMATION

Checkout

Pay in Full

1 Payment of \$520.00

Pay in Installments

4 Payment(s) of \$130.00
No installment fees

^ [Show Payment Schedule](#)

Due Date	Amount
08/01/2020	\$130.00
11/01/2020	\$130.00
02/01/2021	\$130.00
05/01/2021	\$130.00

Your first installment will be charged today. Future installments will be charged approximately 45 days prior to the due date. If payment is not received by the due date, your policy will be cancelled.

Today's Total
\$130.00



GET STARTED VERIFY INFO REVIEW QUOTE CHECKOUT CONFIRMATION

Checkout

[Edit Payment Plan](#)

Payment will be processed by [CyberSource](#)

Credit Card Number* Expiry*

4111 1111 1111 1111 11/22

Name on Card* Security Code*

Test User ...

My billing address is the same as my business address

I agree to submit my enrollment electronically and understand that this electronic signature is binding. I understand, and agree, that the payment method used at enrollment will be used for recurring billing (installments, renewal of the policy, midterm policy changes) unless I notify Marsh of an alternate payment method. You can learn more about Marsh's role and compensation [here](#).

[Complete Purchase](#)



Have questions? Call us at (800) 380-0451

GET STARTED

VERIFY INFO

REVIEW QUOTE

CHECKOUT

CONFIRMATION

Congratulations!

Your enrollment is complete! You will receive your confirmation and program documents in an email from EandOServices@marsh.com shortly.

Name of Insured **TEST PERFORMANCE5062**

Policy Number **24-MGU-20-A49141**

Policy Period **08/01/2020 - 08/01/2021**



DOWNLOAD
Certificate of Insurance



DOWNLOAD
Agent E&O Handbook

By enrolling in this coverage you are now compliant with the WFG-TFA Errors & Omissions requirement. Please be advised that if your contract with WFG-TFA is terminated, you will no longer be eligible for this coverage and it will be cancelled on the date you are terminated.



Have questions? Call us at (800) 380-0451

GET STARTED

VERIFY INFO

REVIEW QUOTE

CHECKOUT

CONFIRMATION

Congratulations!

Certificate of Insurance

Agent E&O Handbook

By enrolling in this coverage you are now compliant with the WFG-TFA Errors & Omissions requirement. Please be advised that if your contract with WFG-TFA is terminated, you will no longer be eligible for this coverage and it will be cancelled on the date you are terminated.

Wait! Have you thought about Cyber Insurance?

Almost 70% of small businesses have experienced a cyberattack. 60% of small businesses could go out of business as a result. Are you protected?

By clicking below you agree to receive communications from Marsh for risk management materials and product offers.

[I'm interested](#)



Enter your business details

Answer just a few more questions to help us tailor the right coverage for your business.

Annual Revenue (in USD)

Number of Employees ⓘ

Year Business Established

Website Address (optional)

Submit



Have questions? Call us at (800) 380-0451

You're on your way to protecting your business!

This insurance product will be available soon.

If you are eligible, we will reach out shortly with options to take advantage of this valuable coverage.