



THE INSTITUTES AGENT & BROKER GROUP
ACCOUNT CREATION

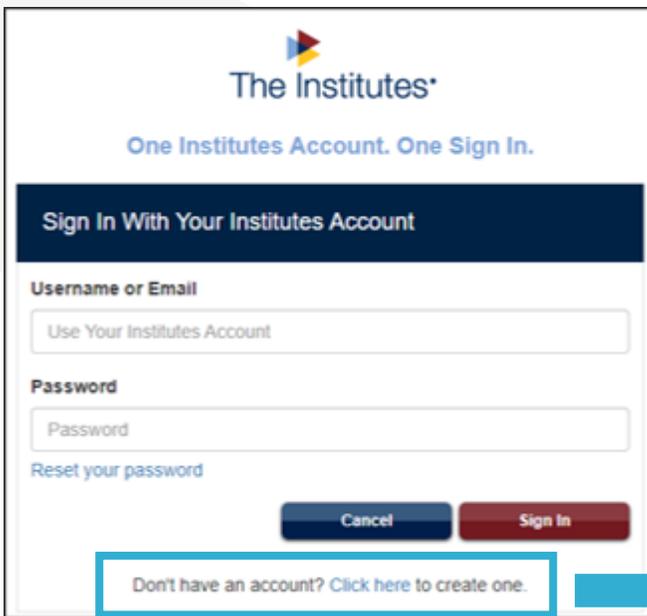
2024

BIG [®]
MONTANA

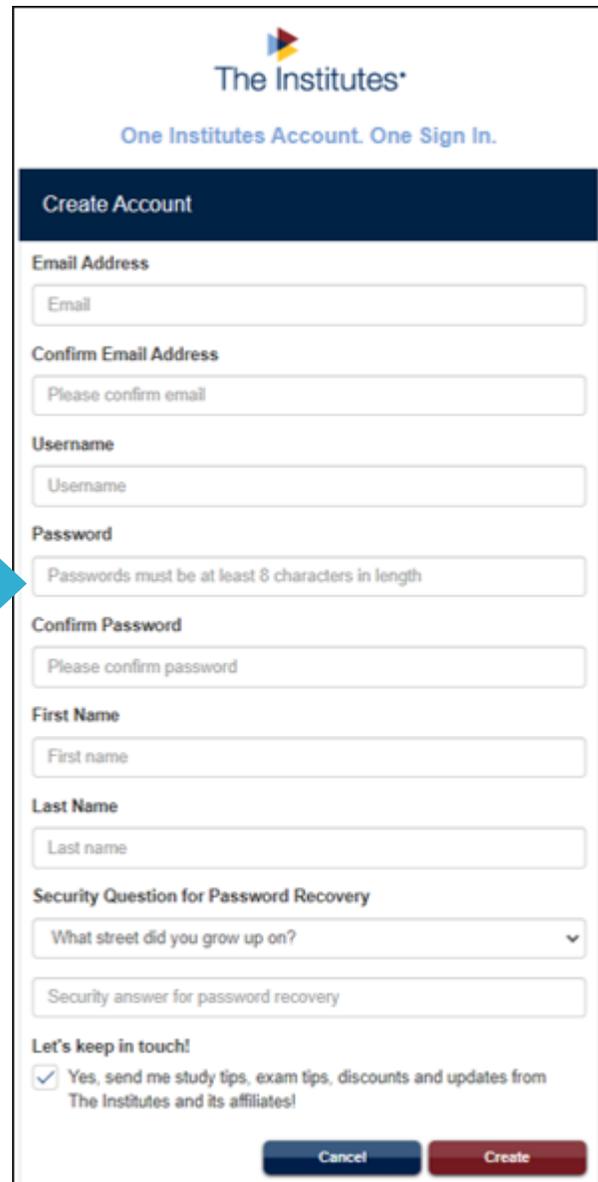
Creating & Maintaining Your Account

Review the following steps to create, update, and maintain an account with The Institutes Agent & Broker Group.

1. Visit [The Institutes Agent & Broker Group](#) website and select [Sign In](#) at the top right corner of the page. On the next screen, select [Click here](#) to create an account.
 - ▶ If you have an existing account, sign in with your credentials and skip to Step 3.
2. Complete the fields and select [Create](#).

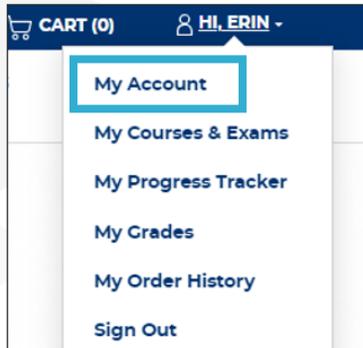


The screenshot shows the 'Sign In With Your Institutes Account' page. At the top is the logo and the tagline 'One Institutes Account. One Sign In.'. Below is a dark blue header with the text 'Sign In With Your Institutes Account'. There are two input fields: 'Username or Email' with a placeholder 'Use Your Institutes Account' and 'Password' with a placeholder 'Password'. A link 'Reset your password' is below the password field. At the bottom are 'Cancel' and 'Sign In' buttons. A blue box highlights the text 'Don't have an account? Click here to create one.' with a blue arrow pointing to the right.



The screenshot shows the 'Create Account' page. At the top is the logo and the tagline 'One Institutes Account. One Sign In.'. Below is a dark blue header with the text 'Create Account'. The form includes several fields: 'Email Address' (placeholder 'Email'), 'Confirm Email Address' (placeholder 'Please confirm email'), 'Username' (placeholder 'Username'), 'Password' (placeholder 'Passwords must be at least 8 characters in length'), 'Confirm Password' (placeholder 'Please confirm password'), 'First Name' (placeholder 'First name'), 'Last Name' (placeholder 'Last name'), and a 'Security Question for Password Recovery' dropdown menu (placeholder 'What street did you grow up on?'). Below the security question is a text field for the 'Security answer for password recovery'. At the bottom, there is a 'Let's keep in touch!' section with a checked checkbox and the text 'Yes, send me study tips, exam tips, discounts and updates from The Institutes and its affiliates!'. 'Cancel' and 'Create' buttons are at the bottom right. A blue arrow points to the 'Create' button from the right.

- Once signed in, hover on your name and select [My Account](#).
- Under [Profile](#), scroll down to [Current Employer](#), select [Edit](#) and type in your company.
 - Select your agency's name from the drop-down list and save your changes. **You must select your agency's name from the drop-down list for the available discounts to apply.**
 - If your agency doesn't appear on the drop-down list, email your new Account Number to ABSupport@theinstitutes.org for assistance.

A screenshot of the 'CURRENT EMPLOYER' form. The title 'CURRENT EMPLOYER' is at the top. Below it, a note states 'Fields marked with an asterisk (*) are required.' There is a section labeled 'COMPANY' with a text input field containing the placeholder text 'Company'.

Adding Your License Information

Maintaining the accuracy of producer state license information in your Institutes account is important to ensure you receive any free CE credits available for passing designation exams.

- Within your Account, scroll down and select [Licenses](#).
- Add or update your information as needed.

A screenshot of the 'Licenses' page. On the left, there is a sidebar with 'Licenses' at the top, followed by 'Order History' and a blue navigation bar with 'MY COURSES & EXAMS >', 'MY PROGRESS TRACKER >', and 'MY GRADES >'. The main content area is titled 'LICENSES' and features a table with columns for 'STATE', 'TYPE', 'LICENSE #', and 'EXPIRATION DATE'. Below the table, it says 'No results found'. There is an 'Add a License' section with a note 'Fields marked with an asterisk (*) are required.' This section contains four input fields: 'STATE*' (a dropdown menu with 'Select an Option'), 'LICENSE TYPE*' (a dropdown menu with 'Select an Option'), 'LICENSE NUMBER*' (a text input field with 'License Number'), and 'EXPIRATION DATE' (a text input field with 'Expiration Date'). At the bottom of this section are two buttons: 'ADD LICENSE' and 'CANCEL'.

Adding the Big I Montana Access Code to Your Account

Big I Montana and The Institutes have partnered to offer unlimited access to CE on demand courses *and* live webinars. To gain access to these offerings:

- ▶ Within your Account, scroll down and select [Learning Resources](#).
- ▶ Scroll down to the AGREEMENT NUMBER section and enter this access code:
IIA5744025BM
- ▶ Click submit and you are all set.
- ▶ When you are ready to enroll in a Webinar or on-demand course, go to www.ceu.com to get started!

We're here to help

For questions or additional information, email ABSupport@theinstitutes.org

