



THE INSTITUTES AGENT & BROKER GROUP
ACCOUNT CREATION

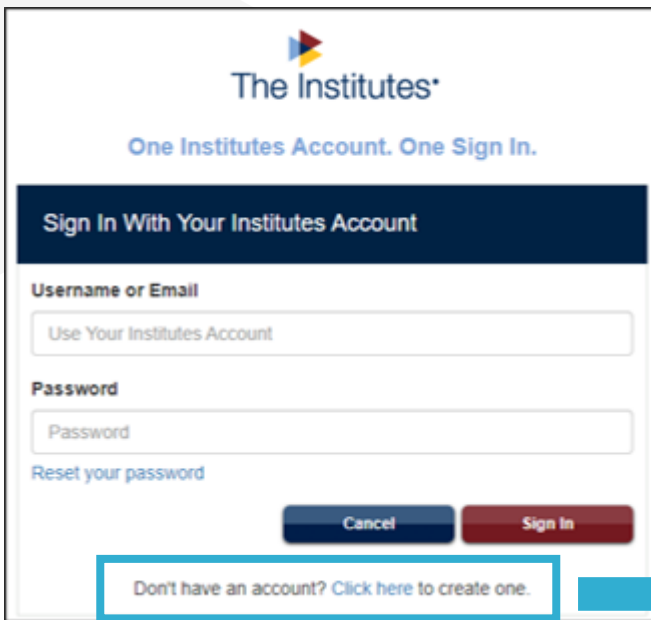
2024

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 Institutes®
One Institutes Account. One Sign In.

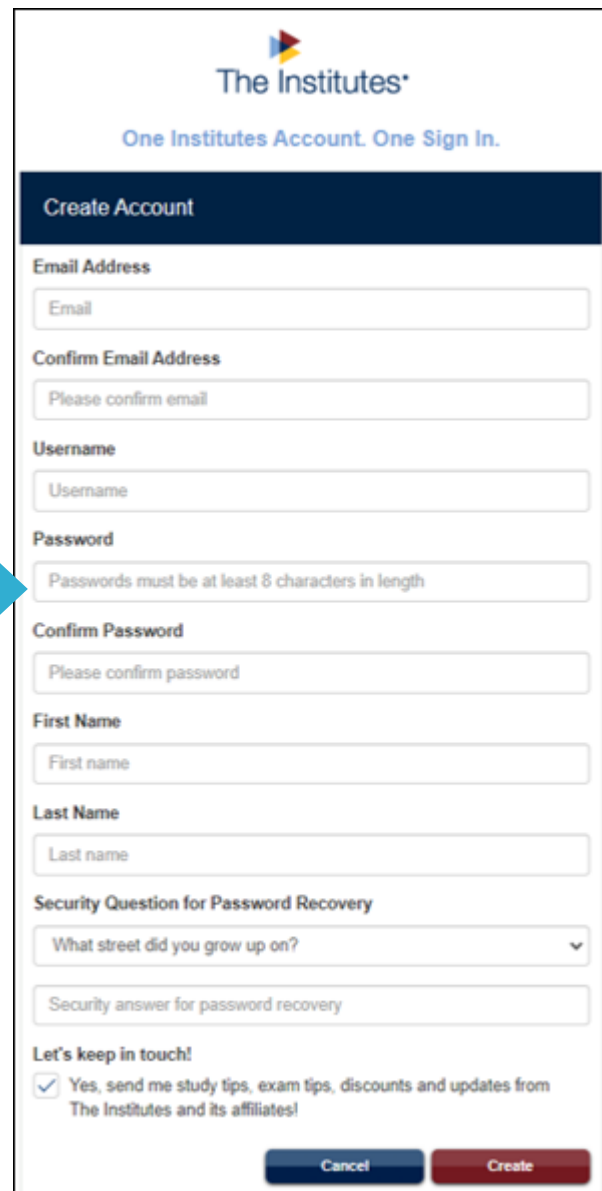
Sign In With Your Institutes Account

Username or Email
Use Your Institutes Account

Password
Password

[Reset your password](#)

Don't have an account? [Click here to create one.](#)



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Create Account

Email Address
Email

Confirm Email Address
Please confirm email

Username
Username

Password
Passwords must be at least 8 characters in length

Confirm Password
Please confirm password

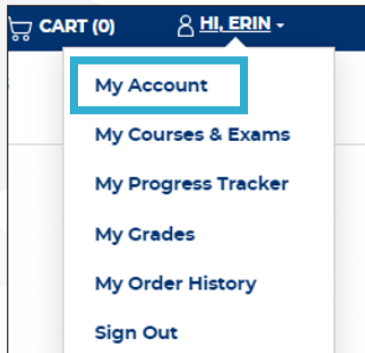
First Name
First name

Last Name
Last name

Security Question for Password Recovery
What street did you grow up on? ▾
Security answer for password recovery

Let's keep in touch!
 Yes, send me study tips, exam tips, discounts and updates from The Institutes and its affiliates!

- 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

