Visit WWW.CLIENTFIRST.COM Today!

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Welcome to our Website!

ClientFirst.com has undergone major renovations! Aside from the new look, you are able to do everything you have always been able to do, and MORE! With easier navigation and intriguing content, you'll be able to find what your looking for easily and keep coming back for more!

Visit www.clientfirst.com to see for yourself!

Products

Our products page is designed for you (the agent) and your clients (the consumer). Sections are separated by Group and Individual products in the drop down menu. Don't know where to look? Simply click "Products" from the navigation bar and all options will appear on one page!

In each section, we have provided information that can be helpful to you and your clients. An additional link lies in the Term Life section which will lead you to DETAILED information on Carriers and Products (Agent Login required!)

Quotes

From the drop down menu, choose the product you are looking to quote. In most cases you will be asked to fill out a form with pertinent information. Once you click Submit, your request will be sent to Client First. We will contact you if we need more information. Your quote will be delivered promptly.

We offer online quoting for Term Life products to REGISTERED Agents. Once you are logged into our site, you will have access to this option.

Term Life Quotes

- Term Life will appear under "Life Insurance" as long as you are logged in. (Also accessible from the Agent Home page)
- Complete the questionnaire.
  NOTE: Be sure to choose the correct state.
- Click "view all quotes" button at bottom of page.
- Rates returned will be sorted by premium, lowest to highest. You may resort highest to lowest, or sort by health category.
- You can either do a new quote, or print out your current quote.
- The best way to print the current quote is to choose the eight (or fewer) products you'd like to feature by clicking in the box to the left of the product. Then click the "Compare all Checked" button on the bottom left. After this comes up, fill in your client's name and your name, and then click on "Print Page" to print a 3 page spreadsheet for your client.

Forms

The drop down menu offers the following options:

- **Health Insurance** - ClientFirst Health Plans and CareFirst (IMD and Group) forms are available for your convenience! The CareFirst link will take you directly to a third party site, while the CFHP forms are updated in-house. Contact our office with any questions.
- **Life Insurance** - You may request a form directly from our website! In addition, once logged in you have access to a Carrier Forms Search for Life Insurance. Enter the desired criteria and click search. Click on the desired form(s). You may then print or email the selected form(s).
- **Client First Bank** - This leads to the "Broker Tools" section of clientfirstbank.com. There are additional forms available if you click the last option: "Employer Kit".

Log In

To www.CLIENTFIRST.com
Agent/Producer: as on the previous site, you will have to log in to access your case status. Logging in also gives you access to other features, such as Online Term Life Quoting, Online (detailed) Term Life product and carrier Information, agent forms and access to Client First National's Web Portal (CFHP business only - See Below!)

To Client First National Web Portal
Health Plan Members: Logging into the Client First National Web Portal is easy and gives up-to-date information such as: claims & claim status, deductible amounts & remaining deductibles, detailed benefit information, prescription drug benefit information, guidelines & plan designs, and required forms, materials & summary plan descriptions!

Employer/Human Resources: Your clients will have easy access to their ClientFirst Health Plan information. Logging into the Client First National Web Portal allows your client to see all the information the member sees, PLUS access to billing information, on-line change requests and more!

Contact

Click on the Contact button on the navigation for contact information on each staff member at Client First. You'll find staff names and job titles, phone numbers and access to email us if needed. **For website assistance, contact web@clientfirst.com.**

www.clientfirst.com

What's New!

Everything is always changing and that includes the "What's New" section on clientfirst.com. This page includes a collection of articles pertinent to the industry. At least one article will be changed/added every week and best of all, we'll keep you updated when an article is added! Clientfirst.com will quickly become your one stop for the most up-to-date articles. Look for the "What's New" button on the left of the page!

What's New

Continuing Education

The Continuing Education page is better than ever! This newly expanded page is your source for all CE related questions.

Continuing Education

Schedule

Client First offers a new CE course every month! Check out the full schedule for these courses PLUS courses provided by several chapters of the National Association of Insurance and Financial Advisors (NAIFA).

New to this section - view upcoming training sessions offered through Client First. Note: These are NOT for CE credit.

Also...

- **Maryland Insurance Administration**: Includes License Renewal Requirements and Frequently Asked Questions. You may also renew your license online!
- **Prometric**: Provides MD Online Continuing Education Services. You may view a full transcript of the credits you've acquired during the licensing period.
- **Frequently Asked Questions**: Includes FAQs on Online Registration and Client First events.
- **A Step-by-Step Guide to Online Registration**: Questions on Online Registration? Let us guide you through...

Agent Contracting Online

The website features a comprehensive list of all carriers along with all required coversheets. This site gives you the ability to submit a new contract request, request additional carriers and view all contract requests!

GET STARTED

- In the bottom, left corner click on '*Agent Contracting*'
- If you are a first time user click on '*AGENT REGISTRATION* ' to create an ID and Password.
- After log in, click '*Contracting Questions'* at the top of the page and fill in the required information.
- At this point you will go through a series of questions to confirm your identity and you will have all of the options unlocked to you.

Case Status

You are still able to check the status of all cases submitted to Client First! New information will be posted several times each day, as it is available from the carrier.

A password is needed to access your information.

From the Home page click on the **Log-In ⇨ Agent/ Producer**. After you enter your Username and Password, you will be placed on the "Welcome, Agent" page. From here, click "Case Status" and a report will appear on the screen indicating all pending business. All policies placed in-force, withdrawn or declined within the past 90 days will also be displayed. You may email our underwriter by clicking on the underlined name on the right side of the screen opposite the policy information. The print button on your browser will print the report.

New User? You can obtain a username and password online by clicking the "Register New" link near to login box. **Forgot Your Password?** No problem! Click the link and enter the email address you have on file with us. Your password will be emailed directly to you!

For immediate access, call 1-800-966-1495 or email web@clientfirst.com to get in touch with someone at our office. Hours of operation are Monday-Friday, 8am - 5pm.

Need Help? Get Help! Contact Us!

We're here to help answer any questions, Monday through Friday, 8am-5pm. Call **1-800-966-1495** or Email **web@clientfirst.com** for assistance!

CDHP / HRA / HSA

Consumer Driven Health Plans (CDHPs) are built on a philosophy of buying less insurance, paying less for it, and handling the most affordable costs yourself. This can either be handled as a company in Health Reimbursement Arrangements (HRA) or as an individual in a Health Savings Account (HSA) type of plan.

Client First Bank

Client First Bank is a full service financial portal with banking services provided by The Bancorp Bank. The Bancorp Bank is a full-service, FDIC insured institution that offers a wide range of personal and business financial services nationwide, including HSAs!