



ELCO Mutual's Agent Portal

You should have received an email from mail@sf-notifications.com, sent to the email address provided on your agent application. This is the User Activation email for access to the Agent Portal. If you have not received this email and do not see the email in your inbox, please check your "Spam" and "Junk" folders.

Once logged in to your user account you will have access to:

- [Applications](#)
- [Transfer Paperwork](#)
- [Brochures](#)
- [ELCO InBasket \(see Tips & Tricks below\)](#)
- [Agent Code Folder \(Deferred Annuity Agents only\)](#)
- [Rate Cards](#)
- [Training Guides](#)
- [Servicing Forms](#)

If you have not received the User Activation email, or have any questions regarding the Agent Portal, please give us a call in Agency at 888-240-3351.

Folders

Once you have activated your account and you have logged in, you should see an icon to the right labeled "Shared Folder". The "Shared Folder" will provide you access to the Agent Tools folder, ELCO InBasket folder, and if you have Deferred Annuity clients with active contracts you will see folder with your Agent Code.

- **Agent Tools Folder:**
 - Applications
 - Marketing Materials
 - Servicing Forms
 - Training Guides
- **ELCO InBasket Folder:**
 - Drag and Drop files to send to ELCO safely and securely through the encrypted Agent Portal.
- **Agent Code Folder:**
 - View and/or download Current Value PDFs of your active deferred annuity clients.
 - Download Excel spreadsheet of all active clients and contracts in one document.

Tips & Tricks

- **Need a policy/contract value but can't remember the policy contract number?**

Due to agent feedback we have expanded the search abilities to include client's first and last names.
- **What is the best way to send documents to ELCO securely?**

The "ELCO InBasket" folder. This folder allows for any files saved on your computer to be dragged and dropped into this folder where ELCO's Agency Department will receive them and get them to the correct department for processing.
- **Are there documents that you use often?**

Click the "star" to the right of the folder or document and that will mark it as a "Favorite". Now, all your "Favorites" will be easily accessible from your Dashboard.
- **Do you need a list of all your active policies?**

Within every agent folder is a XLS document that contains current active policies you have written.
- **How do I know if my file has been uploaded to the "ELCO InBasket" folder?**

Once a file has been uploaded, you can hover over the information in the "Uploaded" column to view Date and Time of upload.