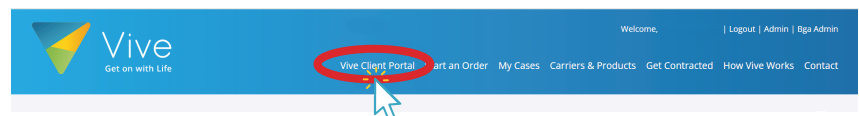**Vive**
Get on with Life

What is it?

Vive Client Portal is a new subscription service that allows your producers to create a customizable, co-branded site which links to their existing Vive account.

Their personalized page can then be used to market directly to prospective customers-- giving them the ability to quote and start a term insurance application on their own.

All activity from this site will save automatically under their **Quotes** page found within the **Vive Client Portal** dropdown menu. Completed orders will also populate under the **Saved Quotes** tab (along with an icon indicating it came from their Portal page).
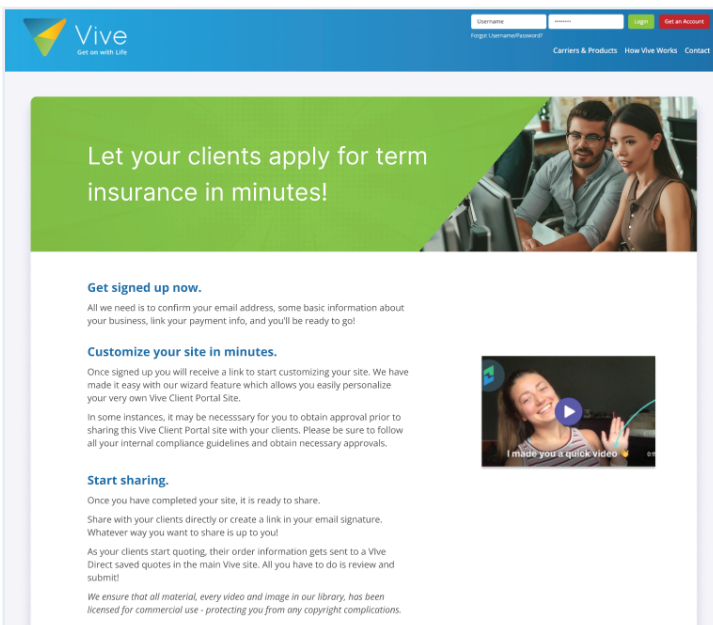

Signing Up

From Vive, choose **Subscribe Now** from the **Vive Client Portal** dropdown located near the top of the page.

Need additional information? Click **Learn More** from this same menu.

Let's Subscribe

1. Customize your Client Portal page by selecting the following:

- Display Name

- Uploading a profile picture and company logo

- Choosing the carrier(s) you wish to display for customers (*Note: companies listed will be reflective of your agency's permissions/settings*)

2. Check the Terms & Conditions, as well as the Compliance Disclaimer

3. After clicking Subscribe, a pop-up will appear providing the user with their personalized link

Sign up for the Vive Client Portal!

Portal Display Name (Clients will see this name on your Vive Client Portal Page)

> Chase Crawford

Portal Display Phone Number (Clients will call here)

> (401) 900-8903

Portal Display Email (Clients will email here)

> ccrawford@getvive.com

Click to upload Profile Image   Click to upload Agent Logo

Carriers to display in Vive Direct:
Note that if an agency turns off a certain carrier you are not able to display that carrier.

- ☑ American General
- ☑ Banner Life
- ☑ Cincinnati Life Insurance Co.
- ☑ John Hancock USA
- ☑ Pacific Life
- ☑ Lincoln National Life Insurance Company
- ☑ Principal National
- ☑ Protective Life
- ☑ Prudential Life
- ☑ Prudential Life of NJ (NY)
- ☑ US Life
- ☑ William Penn

Additional Disclosures: (This can be left blank unless your agency requires further disclosures/conditions to be included here)

> Please add text here, text will be shown on the bottom right of your Vive Client Portal site

By agreeing to the **Terms & Conditions**, you have no objections to the Vive Client Portal Support Team having direct communications with your client in the event that the client is encountering technical issues or has technology related questions regarding the site. The Vive Client Portal Support team is not authorized to provide any advice or recommendations regarding product selection or case design for any carrier.

☐ I agree to the **Terms & Conditions**

☐ I have obtained all approvals, permits, licenses and the like necessary for use of this Site and my use of this Site is and will be in compliance with all such approvals, permits and licenses and any and all other legal requirements.

[Subscribe]

What's Next?

An email will be sent confirming account creation, including the link to their Portal page and steps for obtaining additional information.

Success Valued Producer! Your Vive Client Portal is ready.

We built the Vive Client Portal to extend the Vive experience directly to your clients, keeping your trusted relationships right where they should be - Front and center.

Our modern, simple interface offers a personalized site that can be set-up in a few simple clicks. Client Portal gives customers the freedom to initiate a Term quote at their own pace - completing as much or as little as they'd like. Life Insurance is important. Getting it right is imperative.

You can access your portal via the link here: https://test--vivedtc.netlify.app/6ff69ba8-dfc2-461f-bc0d-9f595ea79491

What happens next?

You may be part of an organization that requires your site to be approved by compliance. If so, we recommend your back office review any Client Portal literature before posting or sending to a customer.

Once you are able to start sharing your Vive Client Portal link, you can include it in email campaigns, send the URL direct to your customer, or add it to your signature line. The choice is yours.

Questions? Need additional help?

If you'd like more helpful tips on the Vive Client Portal, please visit our *Learn More* and *Client Portal How To Guide*. You can also click on the *Manage Subscription* section if you are interested in learning more about customization or billing.

Please feel free to send any additional questions or feedback to ViveClientPortal@getvive.com. We are here to help!