



- 1) Download the "Group Quote Request Form" from the Breeze FMO Marketing folder in the Breeze FMO Google Drive
- 2) Completely fill out the "Group Quote Request Form"
- 3) Email the completed "Group Quote Request Form" AND Complete and Accurate Breeze FMO Census to groupquotes@breezefmo.com
 - a) Subject Line: NEW CLIENT CENSUS SUBMITTAL FOR (POTENTIAL CLIENT NAME)
- 4) If any corrections are required on the form or census, you will be notified of what corrections need made
 - a) Make the corrections, and send the corrected document back to groupquotes@breezefmo.com
- 5) Wait for the Group Quotes to be returned to Breeze FMO - 2-5 Days
- 6) Breeze FMO will notify you that all group quotes have been returned and are ready to schedule a presentation with the client
- 7) Communicate with your client the Group Quotes have been completed and are ready to schedule a presentation
 - a) Reply to the quote email with 2 days and times that the client can meet with a designated agent from Breeze FMO to review the quote, product, and discuss the next steps(1-2 days notice preferred, we will do our best if needed within 2 days
- 8) Once you reply with 2 days and times the client can meet to discuss the quote, product, and discuss the next steps, you will receive confirmation of the appointment and a zoom link will be sent to the client for one of the 2 days and times(Please notify if you would like to be added to this zoom
- 9) The designated Breeze FMO agent will meet with the client and decide to move forward, or reply to you and let you know why the client did not want to move forward/needs more time
- 10) If the client is moving forward, you will be updated as they move to each next step
- 11) Once the Group goes effective, commission will be paid to Breeze FMO according to the specific carrier pay schedule(Usually 30-45 days later)
- 12) Once Breeze FMO receives the commission, you will be contacted to set up payroll(If not already completed)