CONTRACTING SET-UP

Waterlily + Wealth Assurance Group

Bring the case.

We coordinate with your firm.



Keep your existing BGA or carrier relationship where possible. We first review the setup with you and your compliance team, then identify a permitted route for your next case.

You share the starting point.
Firm/CCO contact, client state, current carrier/ BGA relationships and writing codes, licenses/ appointments, and whether you want to lead or have WAG lead.

Four steps—coordinated with your firm.

1. Check existing relationships and case
2. Agree on the advisor role and compensation eligibility.
3. Obtain CCO and, where required, carrier/ BGA approvals.
4. Complete required signatures or training. WAG prepares paperwork and tracks status.

Covered by

WSJ · World Economic Forum · yahoo!finance · TechCrunch

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waterlily.com

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Know what changes before agreeing.

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If dual contracting, a release, transfer or waiting period is needed, we explain it first—including the likely timeline and any effect on existing business or renewals. Moving unrelated business is not a blanket condition.

One owner, parallel progress.

We track outstanding approvals while Waterlily can begin permitted planning and case design. If a code transfer threatens a time-sensitive client case, we evaluate firm/carrier-approved alternatives—including WAG-led or existing-BGA routes—rather than let paperwork silently stall the client.

Our top carriers lineup:

OneAmerica · Nationwide · New York Life · Securian · Lincoln · CareScout

Availability depends on the product, state and approved producer arrangement.

Prefer to delegate the insurance work? We can propose a firm-approved WAG-led path without assuming a contract move.

Start with one case. Send your current setup and CCO contact; we'll confirm the route, your required actions and the expected approval timeline.

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