



Ready to complete your  
**R.I.S.E. Profile?**

Follow these steps!

1

## PLEASE NOTE:

Our website is optimized for modern internet browsers.

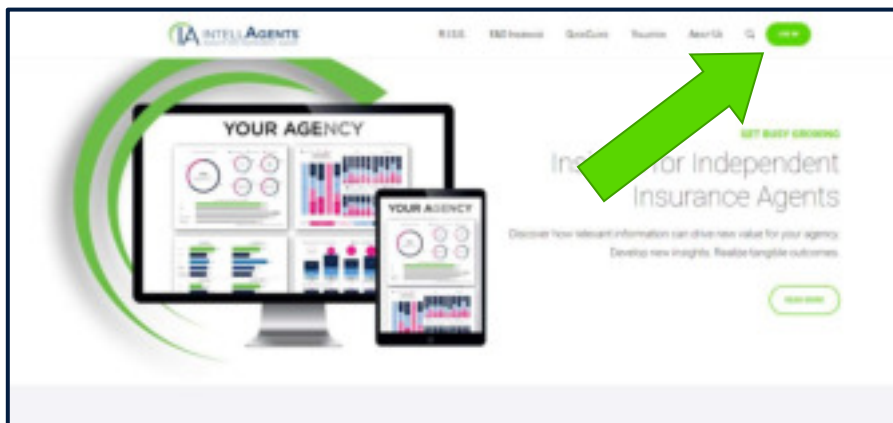
If you use an unsupported browser, our website may not display correctly.

We recommend using **Google Chrome** or **Mozilla Firefox** when accessing the IntellAgents Portal.

2

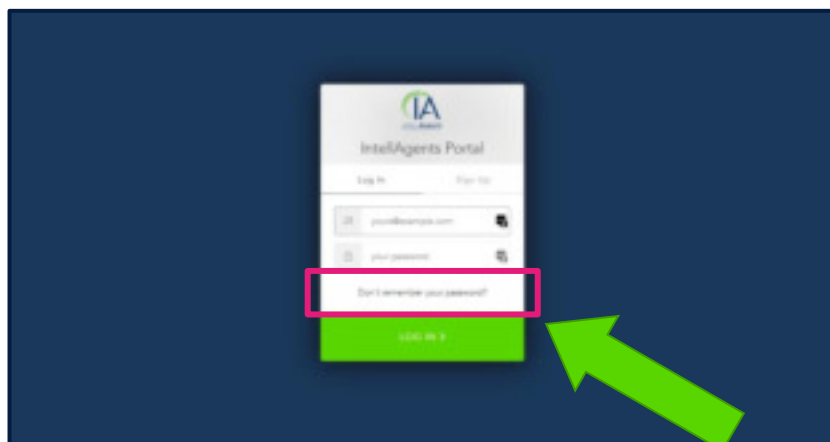


Go to <https://intellagents.io> and click the **Log In** button.



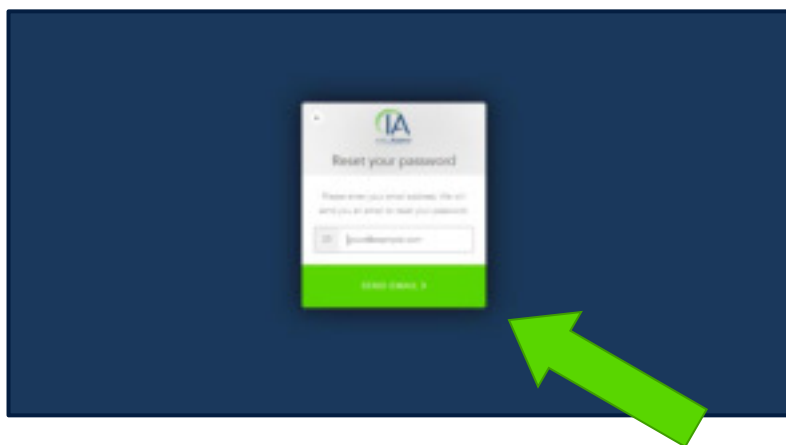
3

Click the **“Don’t remember your password?”** link above the log in button.



4

Enter the **same email address** to which you received the survey invitation, and click the **"Send Email"** button. **Leave this window open!**



5

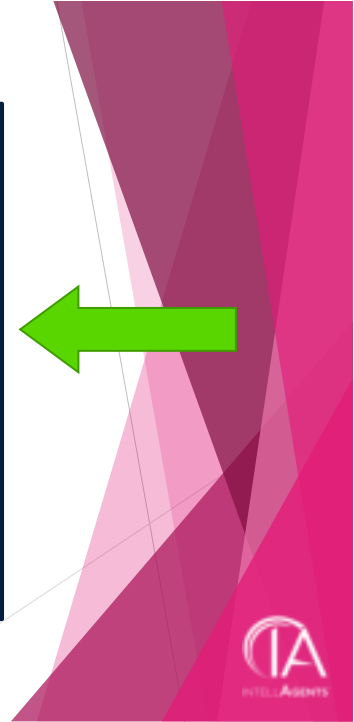
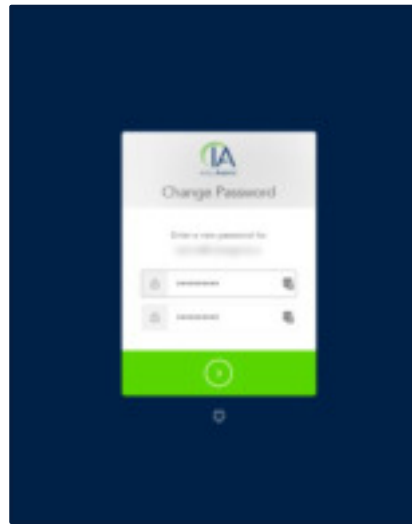
Go to your email, open the message and click the **secure link** in the password reset email.



6

The link will take you to a password reset screen.

Follow the prompts to reset your password and click the green button.



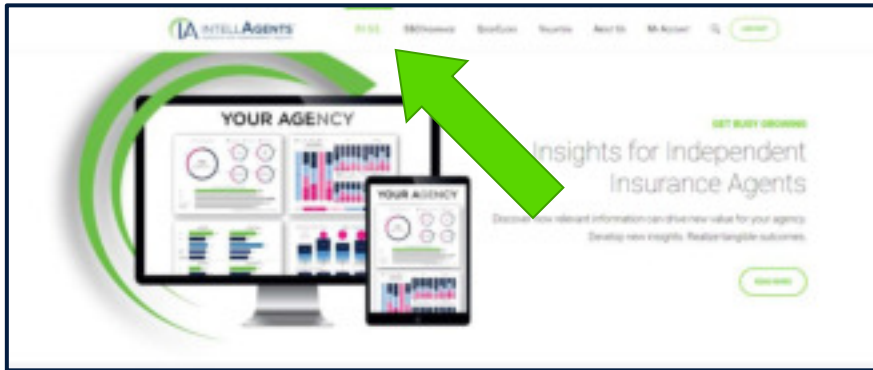
7

Go back to your original login screen, enter your email address and new password, and click the **“Log In”** button.

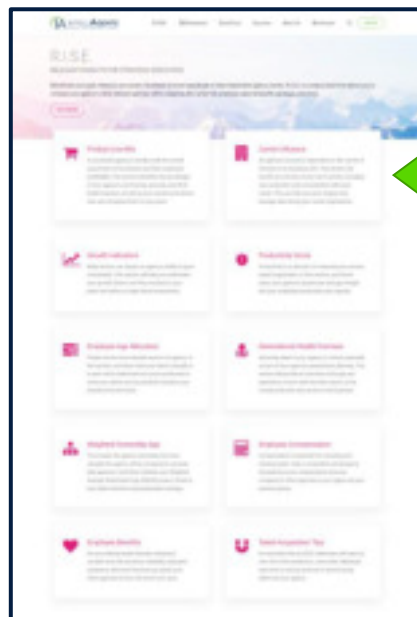


8

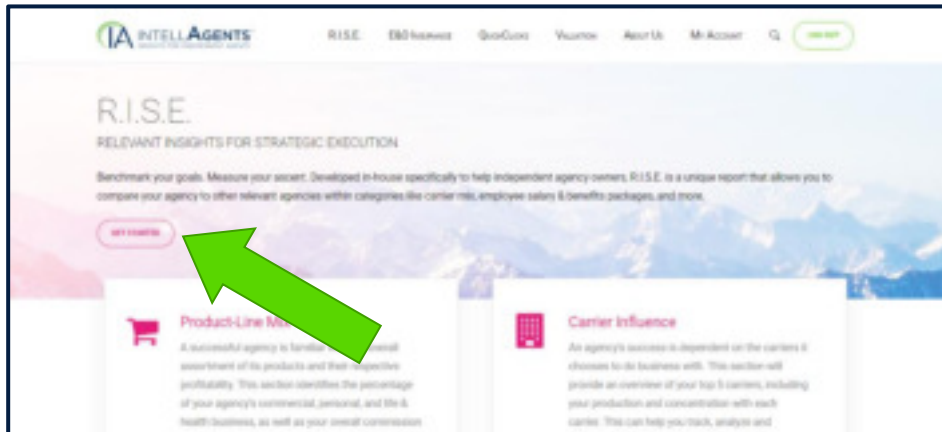
Once you're logged in, click "R.I.S.E." in the top menu.



This will take you to a landing page that provides an overview of what is included in your personalized **R.I.S.E. Report.**



When you're ready to continue, click the "Get Started" button.



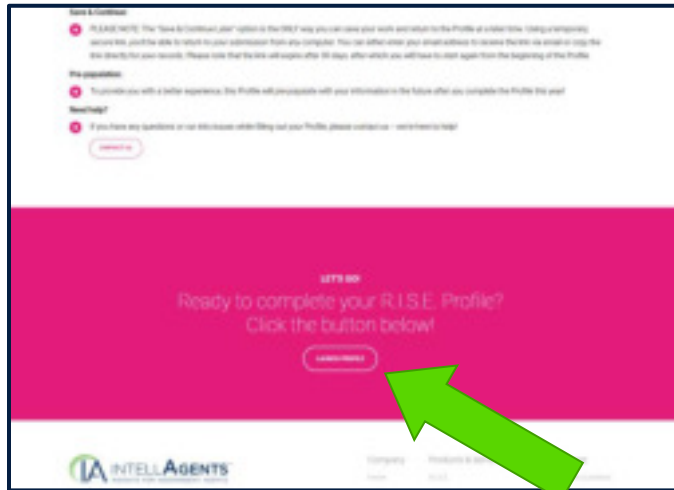
11

This page covers what information you'll need to complete your **R.I.S.E. Profile** as well a step-by-step walk through of the form and other important information.



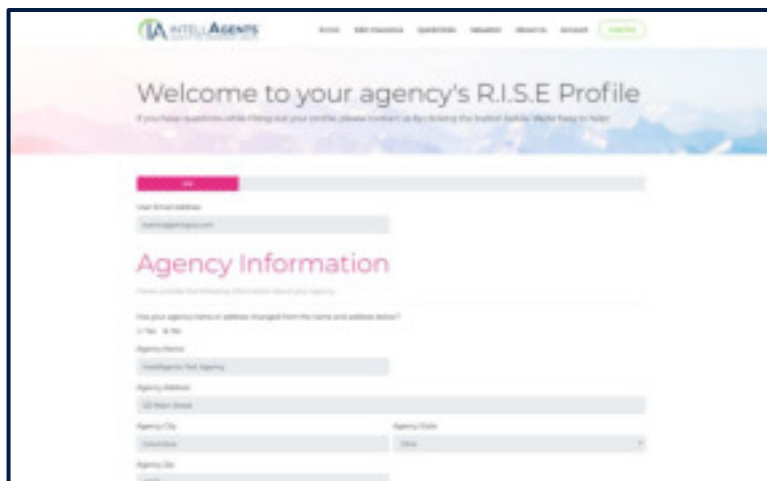
12

To continue to your R.I.S.E. Profile, click the **“Launch Profile”** button.



13

You should now see your agency's **R.I.S.E. Profile!**



14

When navigating through the profile, please use the buttons in the bottom right-hand corner.

The screenshot shows a form with several sections: 'Life & Health Total Earned Commission', 'Earned Commission Totals', 'Agency Book Of Business Change', 'Acquisition Premium', and 'Disbursement Premium'. Each section contains input fields for the years 2016 and 2017. A red box highlights the 'Next' button in the bottom right corner, with a green arrow pointing towards it.

15

If you need to stop and complete the form at a later date, all you need to do is click the "Next" button!

The screenshot shows the top of the R.I.S.E. Profile form. It features the 'INTELL AGENTS' logo, a navigation menu, and a welcome message: 'Welcome to your agency's R.I.S.E. Profile'. Below the message is a progress bar and a 'Next' button highlighted with a red box and a white arrow.

This will automatically save everything you've input so far, so you can easily access it in the future.

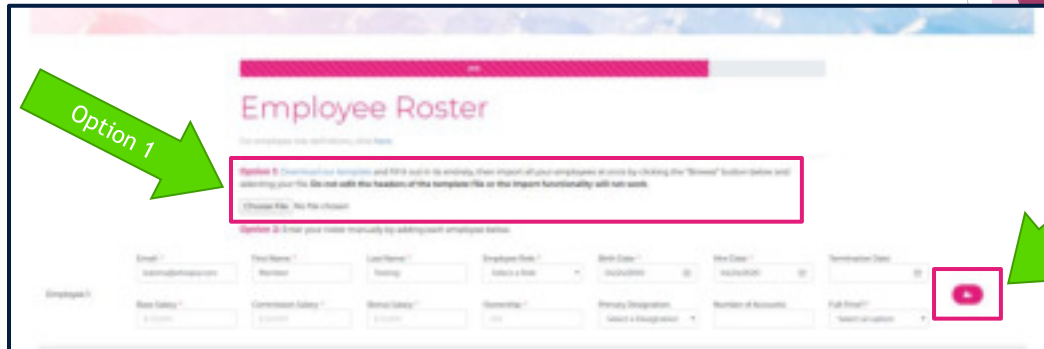
16



When you reach the employee roster section, you have two ways to add employees:

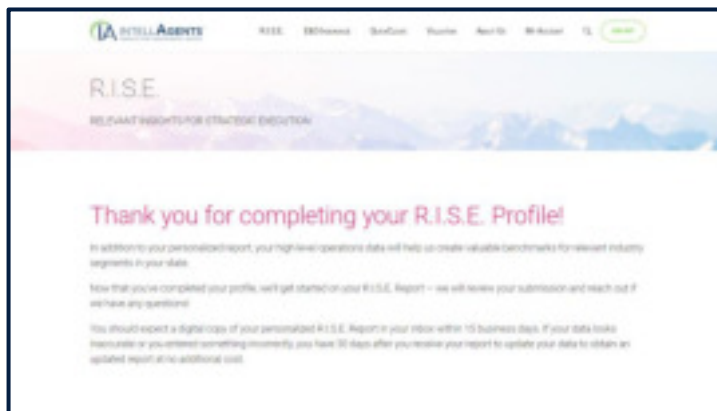
**Option 1:** Use our new “bulk spreadsheet upload” feature

**Option 2:** Add each employee individually



17

Once you get to the last page of the profile and click the “**Submit**” button, you will be taken to a submission confirmation page.

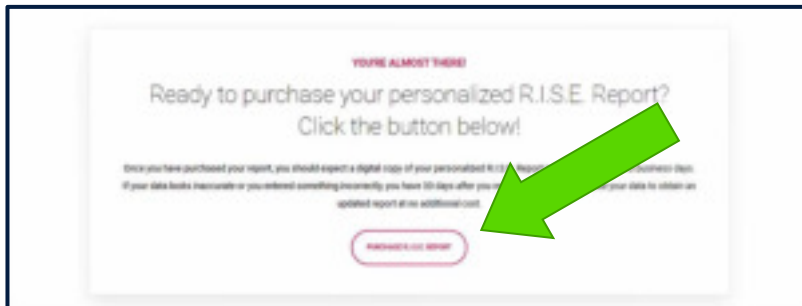


**You are done with your R.I.S.E. Profile!**

18

The last step in getting your personalized R.I.S.E. Report is your purchase!

Click the **“Purchase R.I.S.E. Report”** button to navigate to our online store and purchase your report.



19

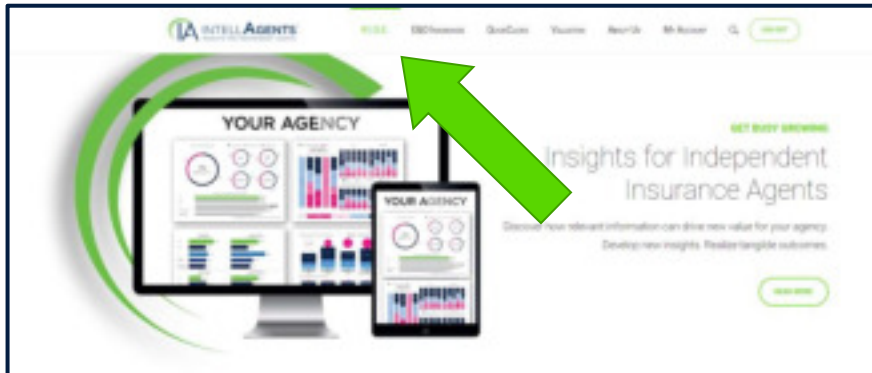
## PLEASE NOTE:

You'll receive a copy of your personalized R.I.S.E. Report within 15 business days of your purchase.

If your data looks inaccurate or you entered something incorrectly, you have 30 days after you receive it to update your data to obtain an updated report at no additional cost.

20

If you need to return to your profile to make changes after you've submitted, log back into the IntellAgents website, click "**R.I.S.E.**" and repeat the previous steps to resubmit.



21



22