

# Weekly Team Training - October 20

## [Overview of Licensed Producer Packet @ 0:00](#)

Andrew reviewed the 23-page Licensed Producer Packet that was recently sent out, explaining that it is used to create a profile in the Insurance Bay portal to help producers track their licenses, E&O coverage, and AML training. He provided detailed instructions on how to properly fill out the various sections of the packet.

## [Handling Unlicensed Producers @ 18:35](#)

Andrew discussed the Referral Partner Agreement for unlicensed producers, which severely limits what they can say about the insurance products. Unlicensed producers cannot receive direct commissions from GP but must be paid by a licensed producer they refer business to. Andrew advised on how to handle unlicensed producers on the team.

## [Upcoming Deadlines and Timelines @ 21:36](#)

The deadline to submit the Licensed Producer Packet is October 30th. Andrew noted that this is an important deadline, as it impacts producers' ability to continue marketing and selling the Capstone products. He also discussed the upcoming slowdown in weekly training sessions from GP as the company shifts focus to the busy enrollment season.

## [Recap and Next Steps @ 27:06](#)

Andrew provided a recap of the key information covered and encouraged participants to reach out with any remaining questions. He also noted that the session was recorded and would be available on Wellness HQ for future reference.

## Action Items

- **Email [licensing@gpagency.com](mailto:licensing@gpagency.com) re: packet status; confirm Petal no longer GP contact - [WATCH \(5 secs\)](#)**
- **Confirm w/ GP licensing handling of submissions from producers licensing after Oct 30; report back - [WATCH \(5 secs\)](#)**