



# **THE INSTITUTES AGENT & BROKER GROUP**

## **ACCOUNT CREATION**

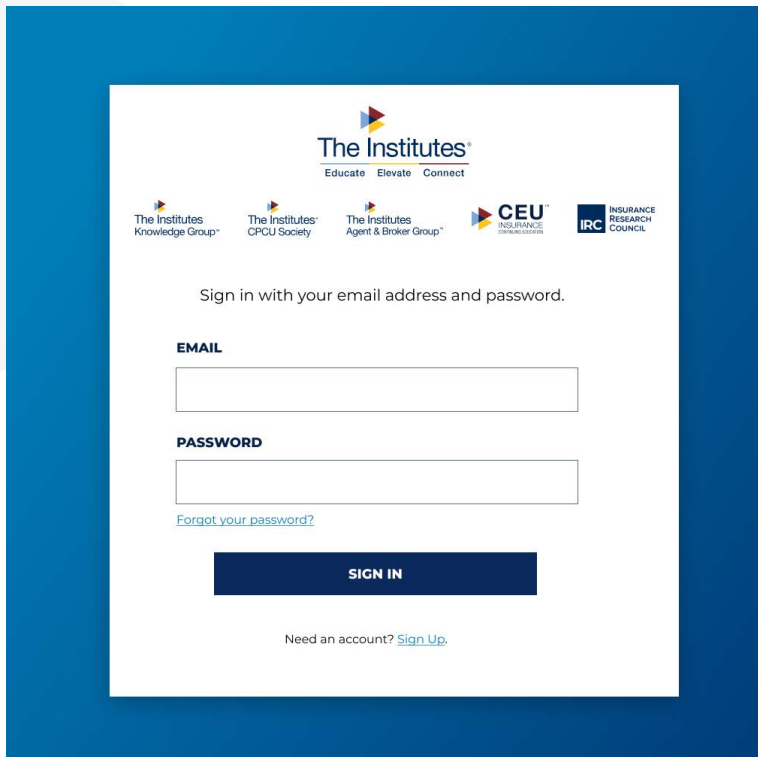
[web.theinstitutes.org/mwaiia](http://web.theinstitutes.org/mwaiia)

# Creating & Maintaining Your Account

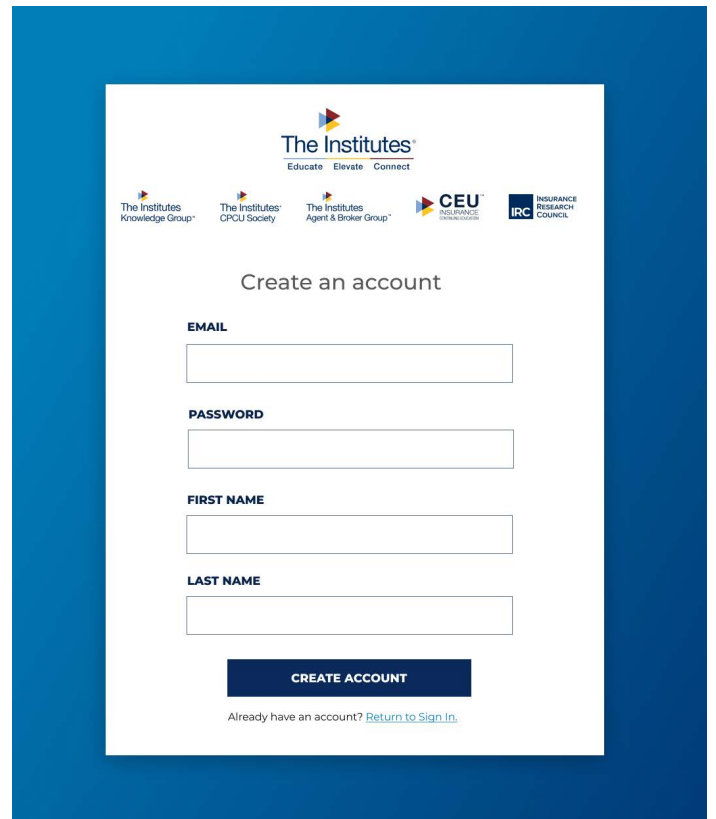
Review the following steps to create, update, and maintain an account with The Institutes Agent & Broker Group.

1. [Click here](#) to sign in to your account.

- ◇ Existing users: login with your credentials.
- ◇ New users: select [Sign Up](#) and complete the fields to create your account.

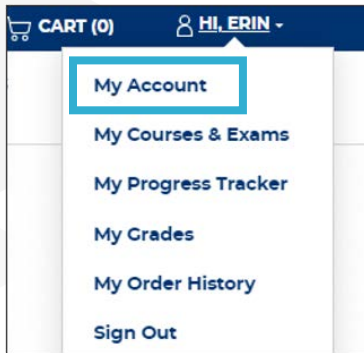


The screenshot shows the sign-in page for The Institutes. At the top, the logo "The Institutes" is displayed with the tagline "Educate Elevate Connect". Below the logo are several smaller logos for affiliated organizations: The Institutes Knowledge Group, The Institutes CPCU Society, The Institutes Agent & Broker Group, CEU Insurance, and the Insurance Research Council (IRC). The main heading is "Sign in with your email address and password." Below this, there are two input fields: "EMAIL" and "PASSWORD". A link "Forgot your password?" is located below the password field. A dark blue button labeled "SIGN IN" is positioned below the input fields. At the bottom, there is a link "Need an account? [Sign Up](#)."



The screenshot shows the create account page for The Institutes. At the top, the logo "The Institutes" is displayed with the tagline "Educate Elevate Connect". Below the logo are several smaller logos for affiliated organizations: The Institutes Knowledge Group, The Institutes CPCU Society, The Institutes Agent & Broker Group, CEU Insurance, and the Insurance Research Council (IRC). The main heading is "Create an account". Below this, there are four input fields: "EMAIL", "PASSWORD", "FIRST NAME", and "LAST NAME". A dark blue button labeled "CREATE ACCOUNT" is positioned below the input fields. At the bottom, there is a link "Already have an account? [Return to Sign In](#)."

2. Once signed in, hover over your name in the top right corner and select **My Account**.
3. Under **Profile**, scroll down to **Current Employer**, select **Edit** and type in your company.
  - ▶ Select your agency's name from the drop-down list and save your changes. **You must select your agency's name from the drop-down list for the available discounts to apply.**
  - ▶ If your agency doesn't appear on the drop-down list, email your new Account Number to [big-i@theinstitutes.org](mailto:big-i@theinstitutes.org) for assistance.

A screenshot of the 'CURRENT EMPLOYER' form. It has a title 'CURRENT EMPLOYER' and a note 'Fields marked with an asterisk (\*) are required.' Below this is a label 'COMPANY' and a text input field containing the word 'Company'.

## Maintaining Your Mailing Address

Under **Profile**, scroll down to **Addresses**, select **Edit** and enter (or update) your Office and Home addresses. Select one as your preferred address and save your changes.

- ▶ This information is required before you can enroll in courses or register for exams.

A screenshot of the 'ADDRESSES' page. It has a title 'ADDRESSES' and a note 'Fields marked with an asterisk (\*) are required.' Below this are two address sections. The first section is labeled 'HOME ADDRESS' and contains the text '610 Main Street, Larissa, MN United States 12345'. It has a '✓ PREFERRED' status and a '✓ PREFERRED ADDRESS' status. Below this are links 'EDIT ADDRESS' and 'DELETE ADDRESS'. The second section is labeled 'OFFICE ADDRESS' and contains the text '141 State Street Suite 902, Larissa, MN United States 67890'. It has links 'EDIT ADDRESS', 'DELETE ADDRESS', and 'MAKE THIS MY PREFERRED ADDRESS'. At the bottom are links '+ ADD NEW ADDRESS', 'SAVE CHANGES', and 'CANCEL'.A screenshot of the address form. It has a title 'COUNTRY\*' and a dropdown menu showing 'United States'. Below this is a label 'ADDRESS 1\*' and a text input field containing '141 State Street'. Below this is a label 'ADDRESS 2' and a text input field containing 'Suite 902'. Below this is a label 'ADDRESS 3' and a text input field containing 'Address 3'. Below this are three labels: 'CITY\*', 'STATE\*', and 'ZIP CODE\*'. The 'CITY\*' field contains 'Larissa', the 'STATE\*' field contains 'Minnesota', and the 'ZIP CODE\*' field contains '67890'. At the bottom are links '+ ADD NEW ADDRESS', 'SAVE CHANGES', and 'CANCEL'.

# Adding Your License Information

Maintaining the accuracy of producer state license information in your Institutes account is important to ensure you receive any free CE credits available for passing designation exams.

1. Within your Account, scroll down and select [Licenses](#).
2. Add or update your information as needed.

Learning Resources

Licenses

Order History

MY COURSES & EXAMS >

MY PROGRESS TRACKER >

MY GRADES >

EDIT

LICENSES

| STATE            | TYPE | LICENSE # | EXPIRATION DATE | \$ |
|------------------|------|-----------|-----------------|----|
| No results found |      |           |                 |    |

Add a License

Fields marked with an asterisk (\*) are required.

STATE\*  
Select an Option

LICENSE TYPE\*  
Select an Option

LICENSE NUMBER\*  
License Number

EXPIRATION DATE  
Expiration Date

ADD LICENSE CANCEL

## Access Learning Programs From The Institutes Agent & Broker Group & CEU

Visit your MWAIIA membership page to access learning content from The Institutes Designations, CE options, and more: [web.TheInstitutes.org/MWAIIA](http://web.TheInstitutes.org/MWAIIA). Follow the instructions on the page to get started and begin your learning journey today!

### We're here to help

For questions or additional information, email [big-i@theinstitutes.org](mailto:big-i@theinstitutes.org).