

# Vive Client Portal

A fully integrated, seamless way for your clients to apply for term insurance!



## Get signed up now. FREE TRIAL FOR FIRST 250 SUBSCRIBERS!

Access Vive through your agency, hover over Vive Client Portal, and click Subscribe Now.

## Customize your site in minutes.

Set up is easy! Simply update your contact details, upload a profile image and your company logo, choose which carriers you wish to display for clients, agree to the Terms & Conditions, and click Subscribe.

## Start sharing.

Once you have completed the subscription process, your personalized link is ready to share. Now you can either embed a hyperlink on your company website or send out via email or text to your customers.

**Jane Invites you to Apply for Term Life Insurance in just minutes.**

- Tell us a bit about yourself
- Review your personalized quote
- Submit application to your advisor

**Start Here** ↓

Let's get started!  
First up, some of the basics

Don't worry. We won't ask your info or spam you.

First Name  
Middle Name  
Last Name  
Email  
Zipcode  
Date of Birth (mm/dd/yyyy)  
Citizenship  
Male Female  
Height Weight  
ft in lbs  
Next, we'll ask you about your health.

Have Questions?  
Jane Doe, Agent (Credentials) | 555.555.5555

Helpful Links:  
What is Term Life Insurance?  
Why do I need Term Life Insurance?  
How much coverage do I need?  
Difference between Term & Perm?  
What term length is right for me?

Powered by **Vive**

## Submit more business!

Send the link via email, post it on your social media page, or add it to your agency's website - the Vive Client Portal lets you meet your clients where they are. As your clients start quoting, their information saves in your existing Vive account in the Client Portal Activity tab. All you have to do is review and submit!

## Want to know more?

Click [here](#) to watch our new Client Portal video or contact us to schedule a demo at – [viveclientportal@getvive.com](mailto:viveclientportal@getvive.com)

*You may need to obtain compliance or firm approval before utilizing the Vive Client Portal. Please follow all necessary compliance guidelines set by your agency.*

## Digital Client Engagement

Meet your clients where they are. Quickly create a personalized website that connect to your existing Vive account, giving you an instant online presence.

## Because Speed Matters

After answering a few questions, your clients get personalized quotes in just a few minutes.

## Trusted Carriers

You'll be offering a curated list of insurers that represent the top names in the term insurance marketplace. These are carriers you can stand behind.