

# Chapter 2: Your Agent Portal — The Command Center

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## Your One-Stop Business Hub

Your agent portal at [agents.ethoslife.com/login](https://agents.ethoslife.com/login) is the central hub for managing your entire business. From quoting and applications to marketing tools and analytics — everything you need is accessible from a single dashboard.

Log in daily to monitor your pipeline, track applications, and access resources that will help you grow.<sup>3</sup>

## 1. Instant Quoting & Applications

Create quotes for clients in minutes directly from your portal. The quoting engine pulls real-time rates from all available carriers. When a client is ready, you can start the application right from the quote.

- Agent-assisted eSignature allows you to walk clients through the application
- Waterfall product routing: if a client doesn't qualify for one product, the system automatically routes them to the next best option
- Most applications receive an instant decision — no waiting for underwriting

## 2. Free Personalized Agent Website

Every agent gets a free, branded Ethos landing page with their name and contact information. Clients can visit your page to get quotes and start applications on their own — and every sale is tracked to you.<sup>4</sup>

- Customizable with your name, photo, and branding
- Clients can self-serve quotes and applications 24/7
- All traffic and conversions automatically tracked to your account
- Integrates with appointment booking tools

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<sup>4</sup>Ethos Agent Website Guide — <https://www.ethos.com/agents/agent-website-guide/>

### 3. QR Code

Download your unique QR code directly from the portal. Print it on business cards, flyers, leave-behind materials, and event handouts. When someone scans your QR code, they're taken directly to your personalized agent website.

### 4. Share Website Link

Your unique URL can be shared via text message, email, social media posts, and anywhere else online. All traffic from your link is tracked to your account, so you get credit for every quote and application.

### 5. Customer & Case Management

Your real-time dashboard shows all customers, application statuses, and policy statuses in one place. Filter by date range, status, or product type, and export your data to CSV for external tracking.

### 6. Build Your Team

Create and manage your hierarchy by recruiting agents to your team. Full visibility, automation and tracking to support agents and build your team.

### 7. Resource Center

Access a library of sales and marketing materials including:

- Ethos Agent Playbook
- Field Underwriting Guide
- IUL resources and selling guides
- Living benefits education materials
- Bundling IUL + Term strategy guide
- Getting Started Landing Page for new agents

## 8. Appointment Booking

Integrate Calendly or Google scheduling directly on your agent website. When prospects visit your page, they can book a time to speak with you — eliminating back-and-forth scheduling.

## 9. Marketing Pixels

Add your Meta Pixel (Facebook/Instagram) and Google Tag to your agent website. This allows you to track visitors from your paid advertising campaigns and build retargeting audiences.

## Portal Feature Quick Reference

Feature	What It Does	Where to Find It
Instant Quoting	Generate quotes and start applications	Dashboard > New Quote
Agent Website	Your personalized landing page	Dashboard > My Website
QR Code	Downloadable code linking to your site	Dashboard > Marketing Tools
Share Link	Your unique URL for sharing	Dashboard > My Website > Share
Case Management	Track customers and policies	Dashboard > Customers
Build Your Team	Recruit new agents to join your hierarchy	Dashboard > Performance
Resource Center	Sales guides and materials	Dashboard > Resources
Appointment Booking	Calendar integration for your website	Dashboard > My Website > Settings
Marketing Pixels	Meta Pixel & Google Tag setup	Dashboard > My Website > Settings

### PRO TIP

Check your portal daily. Treat it like your office — review new leads, follow up on pending applications, and track your metrics. Agents who log in daily close 3x more business than those who check in weekly.