

Chapter 3: Setting Up Your Digital Presence

Customize Your Agent Website

Your Ethos agent website is the foundation of your digital marketing. Before you start sharing it, make sure it's fully set up and professional:⁵

1. Log in to your portal at agents.ethoslife.com/login
2. Navigate to My Website > Settings
3. Upload a professional headshot (high resolution, friendly expression)
4. Add your full name, phone number, and email address
5. Write a brief, compelling bio (2-3 sentences about why you help families)
6. Preview your page and test the quote flow
7. Copy your unique URL and save it — you'll use this everywhere

Set Up Appointment Booking

Integrating a scheduling tool is one of the highest-impact things you can do. Prospects are more likely to convert when they can book immediately.

- Calendly: Free tier available; paid plan at \$9.99/month for custom branding and reminders
- Google Workspace: Use Google Calendar scheduling if you already have a Google Workspace account

Connect your chosen tool through the portal under My Website > Settings > Appointment Booking.

Add Your Meta Pixel

If you plan to run Facebook or Instagram ads (covered in Chapter 7), add your Meta Pixel now:⁶

1. Go to business.facebook.com > Events Manager > Create Pixel

⁶Insurance Digital Marketing 2026 — <https://www.confluencysolutions.com/blog/insurance-digital-marketing-2026>

2. Copy the Pixel ID number
3. In your Ethos portal, go to My Website > Settings > Marketing Pixels
4. Paste your Meta Pixel ID and save

Add Your Google Tag

For Google search ads, add your Google Tag (formerly Google Analytics tracking code):

1. Go to ads.google.com > Tools & Settings > Google Tag
2. Copy your tag ID (format: G-XXXXXXXXXX or AW-XXXXXXXXXX)
3. Paste it in the Google Tag field in your portal settings

Create a Professional Email Signature

Every email you send is a marketing opportunity. Create a professional signature that includes:

- Your full name and title (Licensed Life Insurance Agent)
- Phone number and email
- A clickable link to your Ethos agent website
- Your tagline or a brief value proposition

Order Business Cards with QR Code

Download your QR code from the portal and include it on professional business cards. We recommend Vistaprint, Moo, or similar online printers. Include your name, phone, email, and QR code on the front, with a brief value proposition on the back.

Create a Link-in-Bio Page

Set up a Linktree, Beacons, or similar link-in-bio page with:

- Your Ethos agent website link (most prominent)
- Appointment booking link
- Links to any educational content you create
- Your social media profiles

Digital Presence Setup Checklist

Task	Status	Notes
Customize agent website (photo, bio, contact info)	<input type="checkbox"/> To Do	Complete in Week 1
Set up appointment booking (Calendly or Google)	<input type="checkbox"/> To Do	Free tier available
Add Meta Pixel to agent website	<input type="checkbox"/> To Do	Needed before running FB/IG ads
Add Google Tag to agent website	<input type="checkbox"/> To Do	Needed before running Google ads
Create professional email signature with Ethos link	<input type="checkbox"/> To Do	Use on all outgoing emails
Order business cards with QR code	<input type="checkbox"/> To Do	Vistaprint or similar
Create link-in-bio page (Linktree)	<input type="checkbox"/> To Do	Use on all social profiles
Download QR code from portal	<input type="checkbox"/> To Do	Save high-res version
Test your website link and QR code	<input type="checkbox"/> To Do	Verify everything works