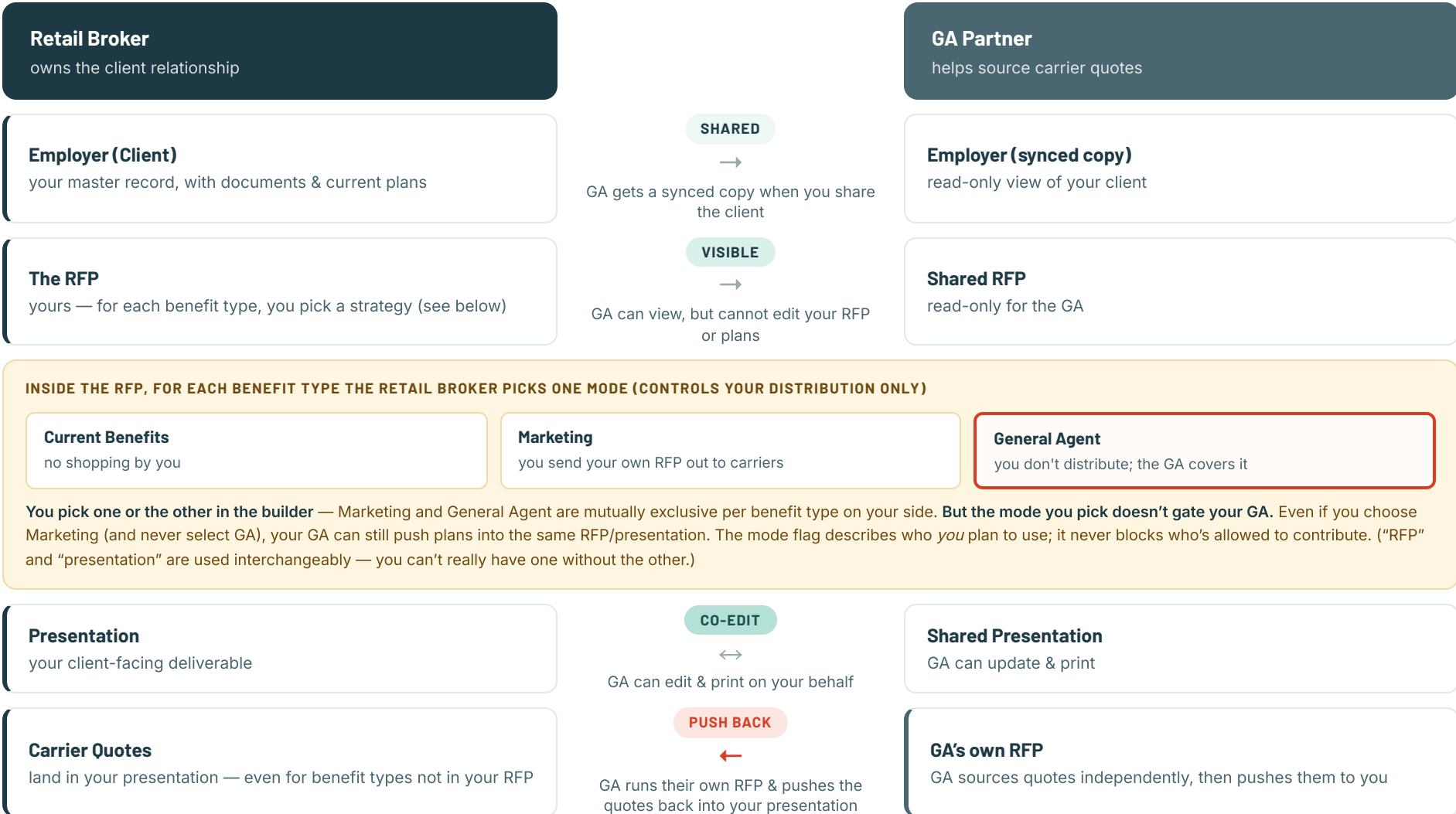


# General Agents – how it works

The retail broker owns the client. The GA is a service partner — with one upstream push back to retail.

- How the connection is created:** In the retail broker’s admin settings, add the GA brokerage as a partner. The GA brokerage must have General Agency mode enabled. Once linked, the retail broker can choose which clients to share.



**The bottom line:** You own the client, the plans, the RFP, and the presentation. Your GA can view your work, edit and print your presentation, and — the killer move — run their own carrier RFP on the side and push the resulting quotes straight into your presentation. New benefit types from the GA show up in your client's presentation automatically.