

# Geniusflow AI — Client Quick Start Guide

Your step-by-step Q&A for getting a life insurance quote, creating an account, and booking with a licensed agent.

## Getting Started

### **Q: What is Geniusflow AI?**

A: Geniusflow AI matches you with licensed life insurance agents and A-rated carriers. You answer a short quiz, see options that fit your needs (Term, Whole Life, or IUL), and book a free call.

### **Q: Do I need to create an account to get a quote?**

A: No. You can take the 60-second quiz at [geniusflow.ai/quiz](https://geniusflow.ai/quiz) without an account. You only need to sign up if you want to save your quote, track your application, or chat with your agent inside the dashboard.

### **Q: Is this free?**

A: Yes. Quotes and consultations are 100% free. There is no obligation to buy.

## Taking the Quiz & Getting a Quote

### **Q: How do I get a quote?**

A: Tap **Get my free quote** on the homepage, or go to [geniusflow.ai/quiz](https://geniusflow.ai/quiz). Answer 8 quick questions about age, health, coverage goals, and budget. You'll see matched options right away.

### **Q: Will you ask for my Social Security Number?**

A: No. We never ask for your SSN during the quiz. A licensed agent may collect it later only if you choose to formally apply for a policy.

### **Q: Do I need a medical exam?**

A: Many of our carriers offer no-exam policies. Your agent will explain which options apply to you based on your health profile.

### **Q: How accurate are the quotes?**

A: Quote ranges are based on the information you provide and current carrier rates. Your final premium is confirmed after underwriting.

## Creating an Account & Logging In

### **Q: How do I create a client account?**

A: Click **Sign in** in the top-right of [geniusflow.ai](https://geniusflow.ai), then choose **Need an account? Sign up**. Enter your name, email, and a password — or tap **Continue with Google** for one-tap signup.

### **Q: I already signed up. How do I log in?**

A: Tap **Sign in** at the top of the site, enter your email and password, then tap **Sign in**. Or use **Continue with Google** if that's how you signed up.

***Q: I forgot my password. What do I do?***

A: On the sign-in screen, tap the password field and look for the reset link, or contact support at [support@geniusflow.ai](mailto:support@geniusflow.ai) and we'll send a reset link.

***Q: Do I have to confirm my email?***

A: No. Accounts are auto-confirmed, so you can sign in immediately after signing up.

## Inside Your Dashboard

***Q: What can I do once I'm logged in?***

A: View your saved quotes, see the carriers you matched with, message your assigned agent, upload documents, and book or reschedule your consultation.

***Q: How do I book a call with an agent?***

A: After the quiz, you'll see a **Book your free call** button. You can also book any time from your dashboard. Pick a time that works — no phone tag.

***Q: Can I switch agents?***

A: Yes. Email [support@geniusflow.ai](mailto:support@geniusflow.ai) and we'll reassign you to another licensed agent at no charge.

## Plans & Options

***Q: What's the difference between Term, Whole Life, and IUL?***

A: **Term Life** gives maximum coverage at the lowest cost for a set period (10–30 years). **Whole Life** is lifetime coverage with guaranteed cash value growth. **Indexed Universal Life (IUL)** offers flexible coverage with cash value linked to market index performance.

***Q: Which one is right for me?***

A: It depends on your goals — income replacement, mortgage payoff, college funding, or long-term wealth building. Your licensed agent will walk you through the trade-offs on your free call.

***Q: Can I get coverage for my spouse or children?***

A: Yes. Family plans and child riders are available. Mention it on the quiz or ask your agent.

## Privacy, Security & Support

***Q: Is my information safe?***

A: Yes. We use bank-level encryption and never sell your data. See our **Privacy Policy** at [geniusflow.ai/privacy](https://geniusflow.ai/privacy).

***Q: Will I get spam calls?***

A: No. Only your assigned licensed agent will contact you, and only about your quote. You can opt out any time.

***Q: How do I contact support?***

A: Email [support@geniusflow.ai](mailto:support@geniusflow.ai) or use the contact form on the website. We typically respond within one business day.

Ready to get started? Visit [geniusflow.ai](https://geniusflow.ai) and tap **Get my free quote**.

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