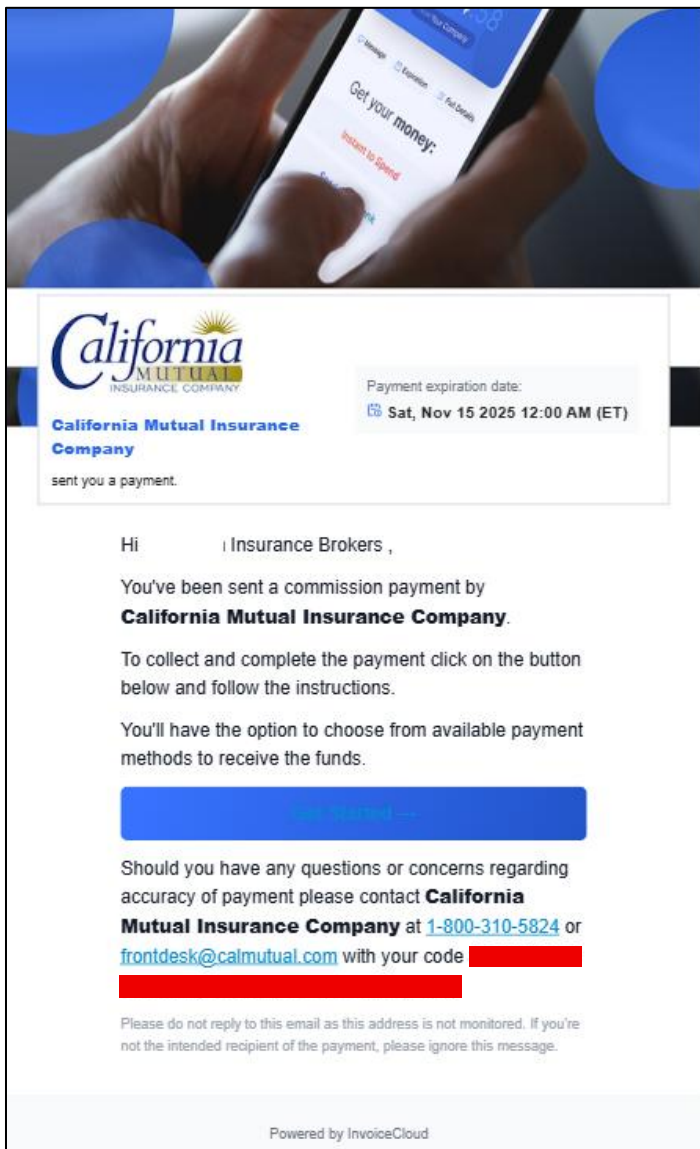




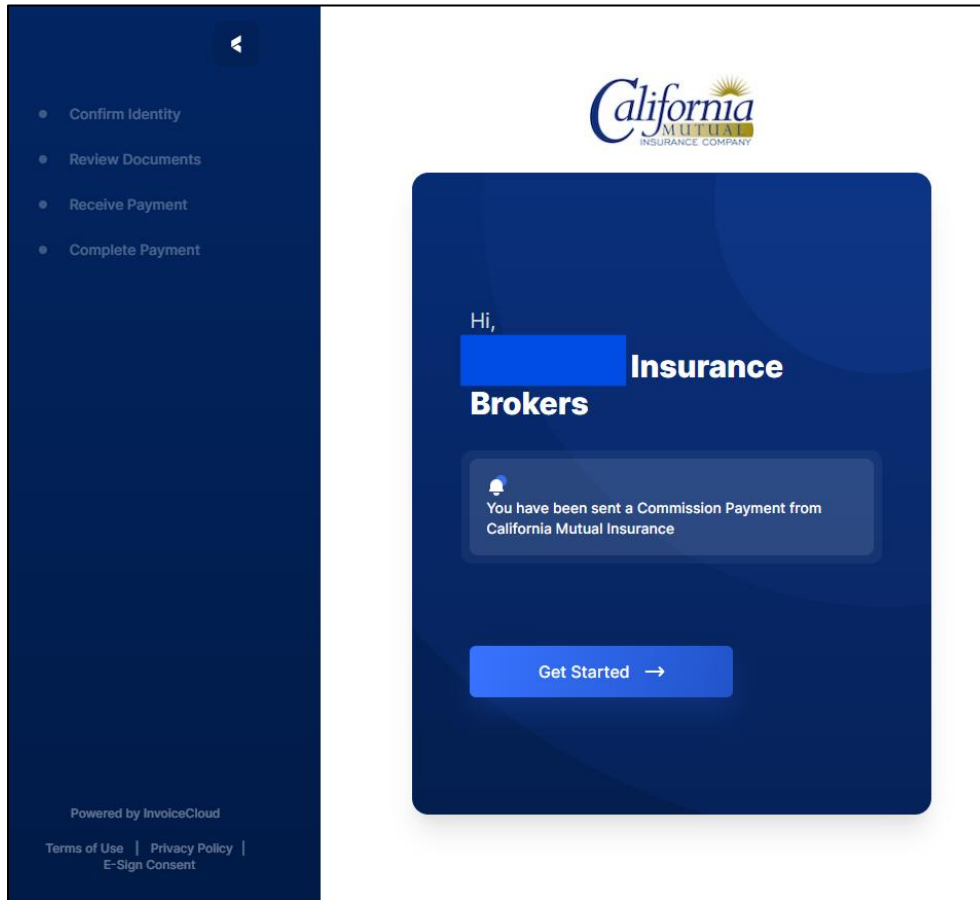
Agency Portal Features: Processing Commission Payments

1. Emails are sent out from CaliforniaMutualInsuranceCompany@smart-disburse.com and this email should arrive to the commission email we have on file.



2. Click on the **Get Started** link (if payment is not processed, reminders will be sent daily for 10 days, after this time frame, the link will expire, and a check will be sent out)

3. This is the next screen that will pop-up on the browser, be sure to have the agency code ready and click “Get Started”



4. Input your agency code (this information can be found in previous commission statements, look at image below) and proceed

The screenshot shows the 'Confirm Identity' step of the process. The left sidebar is identical to the previous screen, with 'Confirm Identity' now highlighted. The main content area is white and has the heading 'Let's make sure it's you!'. Below the heading is a subtext: 'To collect your Commission Payment, please give us a couple details'. There is a text input field with the placeholder text 'What is your Agency ID?'. At the bottom right of the main area is a blue button labeled 'Next' with a right-pointing arrow.



650 San Benito Street
Suite 250
P.O. Box 1326
Hollister, CA 95024
(831) 637-5824

123 Test Address
Walnut Creek, CA 94596

COMMISSION DUE AGENT FOR THE MONTH OF March 2025

Agent Account No: AGENCYCODE

Statement No. [REDACTED]

Statement Date: 03/31/2025

Policy Number	Effective Date	Insured Name	Transaction Type	Transaction Amount	Rate	Commission Due
[REDACTED]	[REDACTED]	[REDACTED]	PAYMENT	[REDACTED]		[REDACTED]
TOTALS:				[REDACTED]		[REDACTED]

COMMISSION DUE TO [REDACTED] Insurance Brokers: [REDACTED]

- After the agency code has been inputted, this next screen will pop up where you must view the commission statement and accept it to continue, please go ahead and **click on the PDF provided**

Confirm Identity

Review Documents

Receive Payment

Complete Payment

Review your Commission Statement

Please select to review the documents below before proceeding with your payment

Commission Statement

I further agree that by selecting Accept on this document it is as valid as if I signed the document in writing.

ATTACHMENTS

PDF

MARCH2025.pdf

Accept

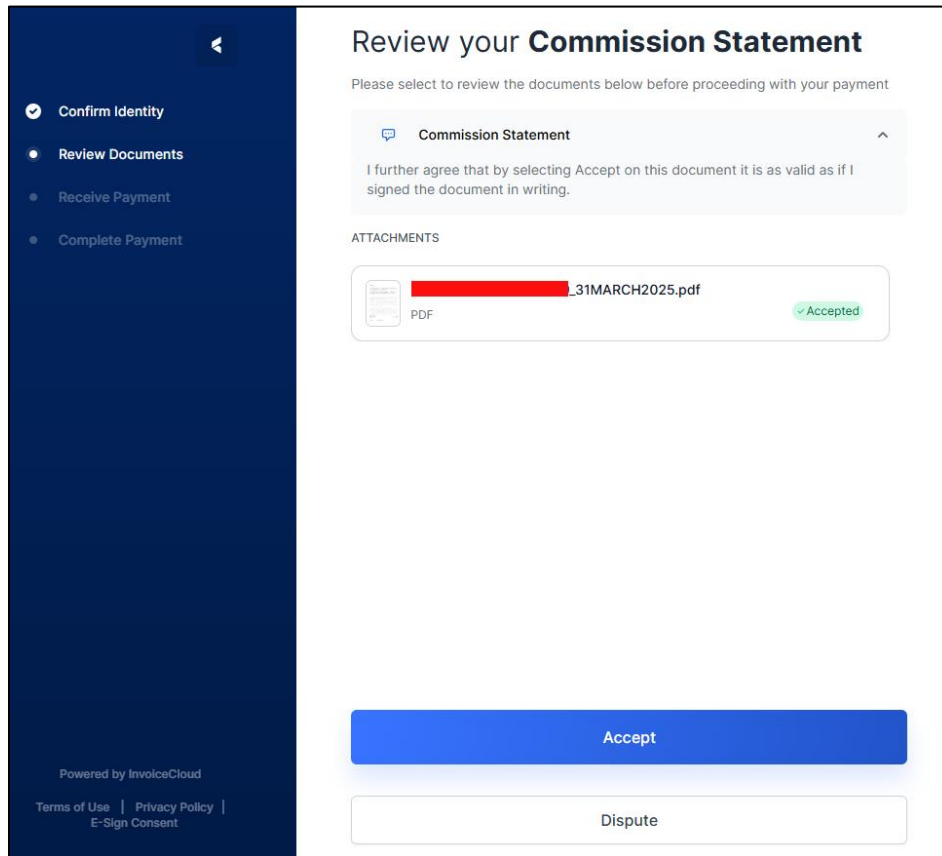
Dispute

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- [illegible]

7. Once the screen says “Accepted,” proceed to click “Accept”



Review your **Commission Statement**

Please select to review the documents below before proceeding with your payment

Commission Statement

I further agree that by selecting Accept on this document it is as valid as if I signed the document in writing.

ATTACHMENTS

PDF: **_31MARCH2025.pdf** Accepted

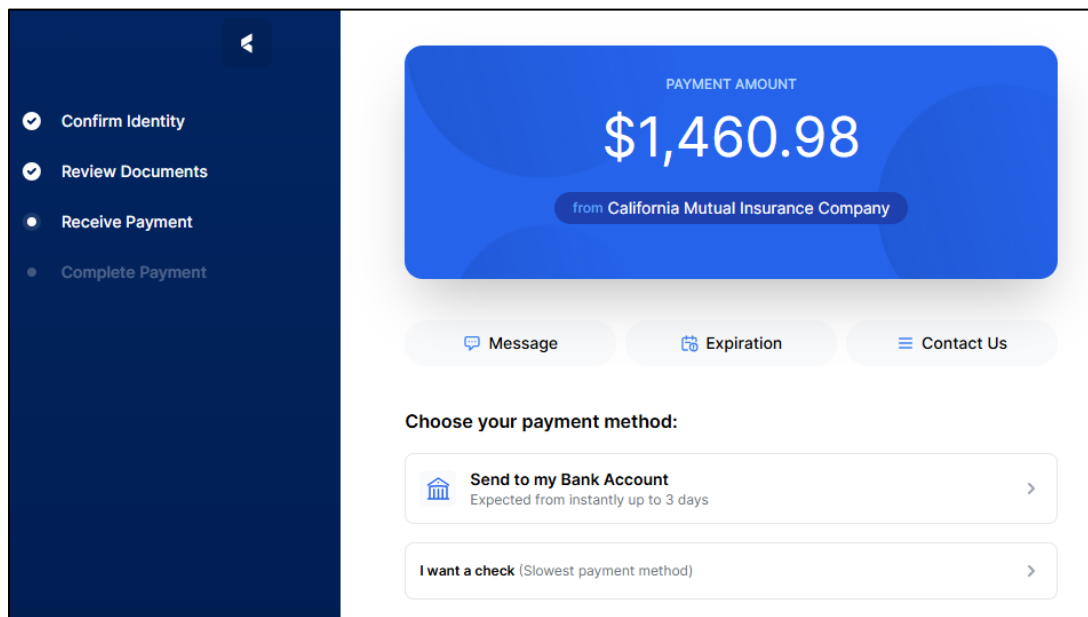
Accept

Dispute

Powered by InvoiceCloud

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8. The next screen will show how much you will be receiving and let you choose between an ACH payment or a check (takes longer)



PAYMENT AMOUNT

\$1,460.98

from California Mutual Insurance Company

Message **Expiration** **Contact Us**

Choose your payment method:

Send to my Bank Account
Expected from instantly up to 3 days

I want a check (Slowest payment method)

9. For an ACH payment, click on “Send to my Bank Account” and enter all your bank account information including whether it’s a Checking or Savings Account

Confirm Identity

Review Documents

Receive Payment

Complete Payment

Enter Your Bank Account Details

\$1,460.98 will be deposited to your bank account

\$

000000000

0000000000000000

9-Digit Routing #

3-17 Digit Account #

It's important to verify your entries to ensure payment is received to your valid bank account.

Account Type

Checking

Savings

Account Holder Name

Insurance Brokers

Routing Number

Can't find routing number?

000000000

Account Number

Can't find account number?

0000000000000000

Re-Enter Account Number

0000000000000000

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10. Be sure to verify all address and account information before clicking “Next”

✓ Bank Details

● Account Information

● Summary

Review **Account Information**

Please fill in or edit your account information

Company Name (Account Holder)

Insurance Brokers

Address Line 1

123 Test Address

Address Line 2 (optional)

City

WALNUTCREEK

State

California

Postal / ZIP Code

94596

Back

Next →

11. Verify the information one last time in this screen and click “Deposit”

☒ Bank Details

☒ Account Information

☐ Summary

One Final Step

Make sure all the details are accurate

PAYMENT AMOUNT

\$1,460.98

ESTIMATED PROCESSING TIME: Instant

Company Name (Account Holder)

Insurance Brokers

Routing Number

Edit

Account Number

It's important to verify your entries to ensure payment is received to your valid bank account.

Billing Address

123 Test Address

WALNUTCREEK CA 94596


Edit

☒ I authorize Transcard to store and use my payment details for future transactions. I may withdraw this consent at any time.

☒ I've read, understand and consent to the [Terms of Use](#), [Privacy Policy](#) and [E-Sign Consent](#).

Deposit \$1,460.98

12. Payment has been disbursed, and a confirmation email will be sent out as well.



Successfully Submitted!

PAYMENT AMOUNT

\$1,460.98

ESTIMATED PROCESSING TIME: **Instant**

Company Name (Account Holder)
Insurance Brokers

Routing Number
ending in 0021

Account Number
ending in 1998

Saved Payment Method
Bank Transfer

Receipt Date
Wed, Nov 05 2025 07:46:58 PM (ET)


Transaction ID
dbf4a965-5d7b-462a-b22c-62a395f4bd7a

Client Payment Reference ID
3E11A7EE-B200-403D-9EF9-A2046CED7B98

California Mutual Insurance Company

[Download Receipt](#)

[Finish and Close](#) Google Chrome



California Mutual Insurance Company

sent you a payment.

Hi Insurance Brokers ,

Commission payment from **California Mutual Insurance Company** has been disbursed to you.

Please click on the button below to view and download your payment details.

[View Payment Details](#)

Should you have any questions or concerns regarding accuracy of payment please contact **California Mutual Insurance Company** at [1-800-310-5824](tel:1-800-310-5824) or frontdesk@calmutual.com with your code **3E11A7EE-B200-403D-9EF9-A2046CED7B98**.

Please do not reply to this email as this address is not monitored. If you're not the intended recipient of the payment, please ignore this message.

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