



HEALTH PLAN ADMINISTRATORS, INC.
AGENT INFORMATION FORM STM PLANS

Agent Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Social Security# \_\_\_\_\_
Corporation/Agency Name \_\_\_\_\_ Tax I.D. \* \_\_\_\_\_ E-Mail \_\_\_\_\_
Business Street Address \_\_\_\_\_ City \_\_\_\_\_ St. \_\_\_\_\_ Zip \_\_\_\_\_
Resident Street Address \_\_\_\_\_ City \_\_\_\_\_ St. \_\_\_\_\_ Zip \_\_\_\_\_
Business Telephone# (\_\_\_\_\_) \_\_\_\_\_ Fax# (\_\_\_\_\_) \_\_\_\_\_ Resident Telephone# (\_\_\_\_\_) \_\_\_\_\_
UPS Delivery Address \_\_\_\_\_ City \_\_\_\_\_ St. \_\_\_\_\_ Zip \_\_\_\_\_

\* If Commissions are to be paid to an Agency or Corporation, and you are not the Owner / Officer, we need an assignment of commissions signed by you. We must also have another Appointment Request Form completed by the Agency Owner / Officer; and copies of their license and the Agency's (if applicable).

PLEASE ANSWER THE FOLLOWING QUESTIONS

- 1. Have you ever been convicted of a felony? \_\_\_\_\_\*
2. Have you ever been involved in an investigation with any State Insurance Department? \_\_\_\_\_\*
3. Has your license ever been suspended, cancelled or revoked by any State Insurance Department? \_\_\_\_\_\*
4. Have you ever had your appointment terminated by another insurance company for any reason other than lack of production? \_\_\_\_\_\*
5. Do you owe any unpaid balance to any Insurance Company, General Agent or Manager? \_\_\_\_\_\*

\* If Yes to any questions 1 through 5, enclose complete details on a separate piece of paper, with your signature and date .

ASSIGNMENT OF COMMISSION REQUEST

Only complete the following if you want HPA to pay your commissions to a Corp., Agency or another Agent.

I \_\_\_\_\_ HPA Code # \_\_\_\_\_

hereby assign to Assignee: \_\_\_\_\_ all of my right, title, and interest in commissions and/or renewals to which I am now entitled or become entitled, under existing contracts and agreements, heretofore entered into by and between myself and Health Plan Administrators, Inc. I hereby authorize and empower Health Plan Administrators Inc., to pay assignee all commissions and renewals now due or which may accrue under said contracts, for a period of one year from this date and thereafter until such time as I terminate this assignment by written notice to Health Plan Administrators, Inc. I agree that such payments of commissions under my contract, the same as if payment was made directly to me. I hereby covenant and agree that I am the absolute and sole owner of said commissions, free from prior assignment or any encumbrance of any kind or character whatsoever, and that I have full right and lawful authority to sell and transfer the same as aforesaid.

Witness my hand this \_\_\_\_\_ day of \_\_\_\_\_, Year \_\_\_\_\_, Agent's Signature \_\_\_\_\_

CAUTION: The person assigning his or her commissions (assignor) will not recover the right to receive any further commissions during the one year period from the date of this assignment unless and until the person to whom such rights are assigned (assignee) releases, in writing, his or her rights to receive such commissions. Please be certain you understand this before signing the form. This instrument may be revoked, in writing, by the Assignor at any time after the one year period.

Address of Assignee: \_\_\_\_\_

Tax I.D.# \_\_\_\_\_ Assignee's HPA Code # \_\_\_\_\_

STATEMENT OF UNDERSTANDING FORM

Health Plan Administrators, Inc. (herein called HPA, Inc.) agrees to pay commissions on the STM Plans listed below, based on the premiums due and paid to HPA, Inc., the plan administrator in accordance with and subject to the conditions and covenants below.

Liberty STM: 18% and Select STM: 20%

- The term "premiums due and paid" shall mean monies, excluding any administrative fees or charges, due and paid for the STM Plan to HPA after the effective date of this Agreement by each insured and for whom the producer is the Agent or broker of record.
• Commissions shall be payable only when Agent is (a) properly licensed to transact insurance business for the Insurance Company and (b) is continuously recognized by the insurer as the agent or broker of record to receive said commissions.
• This Agreement may be terminated by either party with a 30 days written notice but only with respect to new cases. Such terminations will have no effect on the payment of commissions on business written prior to the effective date of termination as may otherwise be payable.
• No advertising material bearing HPA or the Insurance Company's name or describing or naming a product administered by HPA will be printed without prior written approval of HPA.
• The agent is an independent contractor, not an employee of HPA. The agent has no authority to act on behalf of the Insurance Company, bind insurance coverage, waive or alter any provision of the insurance application or the Policy under which a certificate of insurance is issued.
• Representation and opinion of the Agent are not binding on Insurance Company.
• By signing below I am giving HPA prior written express invitation and permission to transmit facsimile and email advertisements to me.

READ CAREFULLY BEFORE SIGNING

The above information is true and complete. I understand false statements on this form may be sufficient cause for termination. I have read the Agent Agreement and understand that if these guidelines are not followed, the result will be termination of the Agreement. A photocopy of this authorization shall be considered as effective and valid as the original. I hereby authorize the Insurance Company and/or its agents to make an independent investigation of my background, references, character, past employment, education, credit history, criminal, motor vehicle record and/or police records, including those maintained by both public and private organizations and all public records for the purpose of confirming the information on my application and/or obtaining other information which may be material to my qualifications for appointment as an insurance agent. I release the Insurance Company and/or its agents and any person or entity, which provides information pursuant to this authorization, from any and all liabilities, claims or lawsuits in regards to the information obtained from any and all of the above referenced sources used. I understand that this form serves as notification that a report will be requested and used for the purpose of evaluating me for appointment as an insurance agent for the Insurance Company.

Agent Signature \_\_\_\_\_ Date \_\_\_\_\_ Title \_\_\_\_\_

GA Name: \_\_\_\_\_ HPA Code #: \_\_\_\_\_ E-mail: \_\_\_\_\_

Address: \_\_\_\_\_ Tele: \_\_\_\_\_ Fax: \_\_\_\_\_

MGA Name: Lawrence S. Brodsky HPA Code #: 050300000 E-mail: lbrodsky@brodskyagency.com

Address: 865 E. Wilmette Rd., Unit 1, Palatine, IL 60074 Tele: 847 991-8040 Fax: 847 991-0152

Mail this completed form with copies of your current license(s) to your GA or MGA. If none is listed, fax it to 1-813-963-5570 or mail to:

HPA, INC. ~ 15436 N. FLORIDA AVE, SUITE 105 ~ TAMPA, FL 33613 (HPA STM AGENT 5/04)