

BROKER OF RECORD CHANGE REQUIREMENTS

	Aetna	Anthem Blue Cross	Blue Shield of California	CalCPA Health*	Cigna	E.D.I.S.
Need original Broker of Record change letter on company letterhead or copy ok?	Copy	Copy	Copy	Copy or fax of letter is required	Copy	Copy
Send Broker of Record change letter to (dept name + fax # or mailing address)	Account Client Manager Team: 1-844-775-0317 or 1-844-250-9110 (fax) or westclientmanagement@aetna.com	Mid-Market Account Manager or Executive Sponsor	Sales Support 877-255-4015	Banyan Administrators: fax: 877-237-4519 email: calcpahealth@fnrm.com	Send to your account rep	Broker Services 888-886-7973
Turn around time for processing this change	7-10 business days	7-10 business days	7-10 business days	2 business days	7-10 days	7-10 days (10 day rescission period)
Does carrier notify existing broker of this requested change?	As a courtesy, Aetna notifies the broker after the change is processed via letter - advising them that they have been removed as the broker of record at the customer's request	Yes	Yes	Yes	Yes	Yes
Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long	1st of the month following receipt	1st of following month	1st of following month	-If request is received before the 15th of the month, it will be effective on the first of the next month. -If request is received on or after the 15th of the month, it will be effective on the first of the month following a one month period. -Please note that this relates to the effective date of commissions. Commissions are paid to the new broker for premiums received on or after the commissions effective date. The broker can start acting on behalf of the firm as soon as we get the request.	1st of month following receipt, as detailed in letter	1st of following month
Is prior agent vested? If yes, how long?	No	No	No	No	No	No

*Broker of Record changes apply to Word & Brown agents business ONLY

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	Health Net	MediExcel Health Plan	National General	Sharp Health Plan	Total Benefit Solutions	UnitedHealthcare	Western Health Advantage
Need original Broker of Record change letter on company letterhead or copy ok?	Copy	Copy	Copy is o.k.	Copy	<p>The letter should be provided on your company letterhead and include the following:</p> <ul style="list-style-type: none"> • Policy Number • Name of the new broker or agency including their Tax ID number • Effective date of the new broker or agency • Signature and Date 	Copy	Copy
Send Broker of Record change letter to (dept name + fax # or mailing address)	Account Management: So. Cal Fax 818-676-6297 No. Cal Fax 800-303-3110	rfp@mediexcel.com	<p>Email (strongly preferred): sflicensing@ngic.com</p> <p>Mail to: National General Benefits Solutions Group Retention-3rd Floor 501 W. Michigan St. Milwaukee, WI 53203</p>	Sales Dept. 858-499-8246	Please email your request to globalrenewals@tbsmga.com	Group Size 2-100: Renewal Account Executive	Sales Department Fax - 916-568-1338 or via email WHASales@westernhealth.com
Turn around time for processing this change	7-10 business days	48 hours	On average 60 days, unless the group is in their first plan year	7-10 business days	48 hours	10 business days	3-5 business days
Does carrier notify existing broker of this requested change?	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Effective date for new broker if group does not rescind this change request is prior agent vested? If yes, how long	1st of following month	1st day of month following receipt of notification.	For new groups, the new BOR change will not be in effect for commissions until the group has reached their first anniversary. Otherwise, we need 60 days notice	1st of following month unless requested during the 1st week of month to be effective that month	Broker of record effective date will be what is listed on the BOR letter. For commission purposes, will be 1st of the month following receipt of the change request.	1st of following month	1st of the following month
Is prior agent vested? If yes, how long?	No	No	No	No	No	No	No