

Name of Agent: \_\_\_\_\_

State: \_\_\_\_\_

### **Agent Appointment Check List**

- Agent Appointment Form
- Agent Information Questionnaire
- Agent Agreement
- Hitech Business Associate Agreement
- Copy of Life and Health License
- Copy of Certificate for Agent's E&O Insurance Coverage (*Or Evidence of Coverage Under Agency's E&O Insurance Coverage*)
- Submittal of W-9 is required for both agents and agencies seeking appointment:
  - o Agents not assigning commissions to an agency must submit their W9 only.
  - o Agents assigning commissions to an agency must submit both their W9 and also the agency W9.

Date Received: \_\_\_\_\_

Sent request for missing information to: \_\_\_\_\_ Date: \_\_\_\_\_

Date Complete: \_\_\_\_\_