

**Agent of Record Letter**

The Agent of Record Letter must be:

- on the Account's Letterhead;
- dated with both the date signed and the effective date; and
- signed by an owner, partner or specific corporate officer of the Account.

The text of the Agent of Record Letter must include the following:

Please be advised that \_\_\_\_\_ (the "Agent") and \_\_\_\_\_ (the "General Agent") has been selected by \_\_\_\_\_ (the "Account") as its Agent of Record effective \_\_\_\_\_ (date).

I acknowledge that any Contract for provision of group health care coverage must be entered into between the Carriers and the Account. The Agent cannot bind coverage on behalf of the Carriers. I understand that all payments, other than the initial premium payment which shall be made payable to the Carrier, should be sent directly to the Carrier from whom coverage is purchased and not to the Agent. I understand that, if eligible, commissions on the Account will be paid by the Carriers, and additional compensation referred to as "override commissions" may be earned from the Carriers for meeting overall sales and retention goals.

By: \_\_\_\_\_  
(Signature)  
\_\_\_\_\_  
(Name)  
\_\_\_\_\_  
(Title)  
\_\_\_\_\_  
(Account)  
\_\_\_\_\_  
(Date)

\*\*THE SIGNATORY OF THIS BROKER OF RECORD LETTER REPRESENTS  
THAT HE OR SHE HAS THE AUTHORITY TO LEGALLY BIND THE  
ACCOUNT.\*\*