



# HPA, INC. AGENT LICENSING INFORMATION ~ STM INSURANCE PLANS

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

\* If we are to pay commissions to an Agency or Corporation, and you are not the Owner / Officer, we need an assignment of commissions signed by you and we must have another License Request Form completed by the Agency Owner / Officer; and copies of their license. Include the Agency's license if applicable in your state.

## ANSWER THE FOLLOWING QUESTIONS

1. Have you ever been convicted of a felony?.....  YES  NO
  2. Do you owe any unpaid balance to any Insurance Company, General Agent or Manager?.....  YES  NO
  3. Have you ever been involved in an investigation with any State Insurance Department?.....  YES  NO
  4. Has your license ever been suspended, cancelled or revoked by any State Insurance Department?.....  YES  NO
  5. Have you ever had your appointment terminated by another insurance company for any reason other than lack of production?.....  YES  NO
  6. Have you ever been charged arrested or convicted of a misdemeanor other than minor traffic violations?.....  YES  NO
  7. Have you ever filed Bankruptcy, been sued or had a judgment entered against you?.....  YES  NO
  8. Have you ever been refused a bond or had a bond cancelled for cause by any company?.....  YES  NO
- Any "YES" answer to questions 1 through 8 requires a separate statement, including dates, location, basis of charge and legal documentation indicating disposition of case.
9. Do you carry errors and omissions coverage?  YES  NO If YES, list carrier name and address below:

10. What lines of insurance are you licensed:  Life  Accident / Health  Other \_\_\_\_\_

11. Please list the states where you now hold a license:

State \_\_\_\_\_ License # \_\_\_\_\_; State \_\_\_\_\_ License # \_\_\_\_\_; State \_\_\_\_\_ License # \_\_\_\_\_  
 State \_\_\_\_\_ License # \_\_\_\_\_; State \_\_\_\_\_ License # \_\_\_\_\_; State \_\_\_\_\_ License # \_\_\_\_\_

Attach copies of your resident and all nonresident licenses, based on where you plan to sell the HPA products. (We do not need an appointment fee.)

## ASSIGNMENT OF COMMISSIONS 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 HPA Plans listed, based on the premiums due and paid to HPA, the plan administrator, in accordance with and subject to the conditions and covenants below. *Note: Please indicate below, the HPA products you plan to sell:*

- Secure Med STM 18%  Secure Med 12x3 15%\*  Liberty STM 18%  Select STM 20%  OTM STM 15%  Rx-Pay Card 15%

\*The Secure Med 12x3 plans commissions are reduced by 7.5% in years 2 and 3.

- The term "premiums due and paid" shall mean monies, excluding any enrollment, administrative or association fees, due and paid for the HPA Plans 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 (on paper, over the radio or television or on the Internet) bearing the product's, HPA's or the Insurance Company's name or describing any named product administered by HPA can be produced without prior written approval from HPA and the insurance company.
- 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.
- Representations and opinions of the Agent are not binding on the 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 #: \_\_\_\_\_ Email: \_\_\_\_\_  
 Address: \_\_\_\_\_ Tele: \_\_\_\_\_ Fax: \_\_\_\_\_  
 MGA Name: \_\_\_\_\_ HPA Code #: \_\_\_\_\_ Email: \_\_\_\_\_  
 Address: \_\_\_\_\_ Tele: \_\_\_\_\_ Fax: \_\_\_\_\_

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

You can mail the forms to: HPA, INC., 15436 N. FLORIDA AVE., SUITE 105, TAMPA, FL 33613