

Successor Agent Program Q&A

What is a Successor Agent?

- A Successor Agent is defined as a qualified agent who will service the members in the book of business being transferred to him or her, and in turn that qualified agent will receive renewal commissions for the UnitedHealthcare members in that book of business.

Why would I use the Successor Agent Program?

The Successor Agent Program is a great way to plan for the future!

- **Exiting the Business:** Transfer a book of business to another eligible agent/agency with the expectation that the new agent/agency will service the members in that book.
- **Maintaining Business:** Manage continuity of past business written as an individual by enacting a successor agreement to your own corporation.
- **Deceased Agent:** UnitedHealthcare will allow an eligible successor agent to take over a book of business when we are notified within 60 days of death and the agreement is completed within 90 days of death.

What are the minimum requirements for the Successor Agent Program?

- Original and successor agents cannot be the subject of an open complaint investigation.
- Original and successor agents must be in the EDC or ICA channels. The successor agent program is not available to Solicitors, ISRs, or Telesales Agents.
- Overrides are not eligible for transfer to a lower level (for example, MGA to Agent level).

I currently have a chargeback debt balance. Am I eligible for the Successor agent program?

Yes, the original agent's outstanding chargeback debt balance will be transferred to the successor agent upon execution of the successor agent agreement.

I sell AARP Medicare Supplement plans. What happens to my Unearned Advance Debt (UAD)?

The original agent's outstanding Unearned Advance Debt (UAD) balance will be transferred to the successor agent upon execution of the successor agent agreement.

Will the original agent be able to terminate the successor agent agreement?

No, the original agent loses all rights to their book of business upon execution of the successor agent agreement.

Will the successor agent be able to setup their own successor agent agreement?

Once a successor agent agreement is in place the successor will not be eligible to setup a successor agreement to another agent (successor of a successor).

What is the Successor agent process?

- Submit the Successor Agent Interest Form to sh_commissions_administration@uhc.com.
- Broker Commissions team will verify eligibility and send out the Successor agent agreement
- Original and Successor agent sign and return the agreement.
- Broker Commissions team will complete the agreement and send all final documentation to both the Successor and Original agents.

I still have questions. What should I do?

Refer to the Agent Guide (Section 2: How do I Get Started?) or contact the Producer Help Desk (PHD) Successor Agent Hotline at 888-240-9165.