

Aetna Senior Supplemental Insurance Contracting Quick Reference Guide

Complete the required form(s) based on the type of request(s):

- More than one request type may apply.
- Changes go in effect on business written on or after the home office processes the request.
- New agent submissions, hierarchy and level changes, and adding advancing may be requested through the Agent Management tool on the secure agent website **AetnaSeniorProducts.com** and through Surance Bay.

Contracting Form:	New Agent	Request Additional State Appointment	Add Commission Advancing	Commission Level Change	EFT (Bank Draft) Set Up	Hierarchy Change*
Producer Information and Appointment Form (PIF) (CGFLP02856)	Yes, complete all sections	Please request additional states through the Agent Management tool on our secure agent website	No	Yes, complete page 6 with level and hierarchy listed	No	Yes, complete all sections
Fax Cover (CGFMP01906)	Yes		Yes	Yes	Yes	Yes
Contract/Agreement (based on type of producer)	Yes		No	No	No	Yes
W-9	Yes (unless LOA)		No	No	No	Yes (unless LOA)
Commission Advance Addendum (CGFLP01596)	Optional		Yes	Optional		
Electronic Funds Transfer (EFT) Authorization (CGFLP01598)	No (see PIF)		No	No	Yes (or complete Sections 2, 3, 7, and 8 of PIF)	No (see PIF)
State License(s) for all lines that apply	No		No	No	No	No
Multipurpose Confidentiality Addendum and Producer Conduct Rule	Read-only copy retained by agent	No				Read-only copy retained by agent
Guide to Ethical Market Conduct (CGF01637)		No				

*A new background check may be required if adding a new principal or agency.