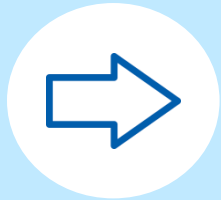


Planning for the Future?

UnitedHealthcare Successor Agent Program Available August 1, 2016



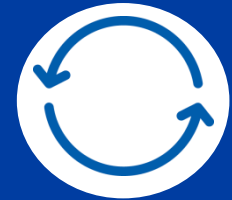
Exiting the Business

Transfer a book of business to another eligible agency/agent with the expectation that the new agency/agent will service the members in the book.



Deceased Agent

UnitedHealthcare will allow an eligible successor agent to take over a book of business when we are notified within 30 days of the death and the agreement is completed within 90 days of death.



Maintaining Business

- Incorporate to enact a Successor Agent agreement.
- Manage continuity of past business written as an individual by enacting a successor agreement to your own corporation.

 **Questions? Contact the Producer Help Desk (PHD) Successor Hotline at 888-240-9165**



THINGS TO KNOW

Things to Consider

In order to apply you must be able to meet program requirements and answer “True” to all of the below statements.

- I am currently receiving more than \$2000 in annual renewal payments.
- I am an External Distribution Channel (EDC) agent or Independent Career Agent (ICA). (This program is not available for Solicitors, Internal Sales Representatives or Telesales Agents.)
- I am **not** the subject of an open complaint investigation.
- I have a Successor Agent in mind or can work with my upline/manager to identify one who is active, contracted and will service the members in my book.

Need more Information?

- Contact the PHD Successor Hotline at **888-240-9165**.
- The PHD will walk through the program and provide a Successor Agent interest form if your situation seems to fit the criteria.

Maintaining Your Business

- Look at the **maintaining your business** option as part of your 2017 business planning.
- Consult with independent legal and accounting representatives to discuss succession planning.