



AGENT TO MGA ASSIGNMENT

MGA NAME: PEEK PERFORMANCE

MGA NUMBER: 446

I understand that by signing the attached form I am agreeing to be aligned under the downstream agent hierarchy of the above mentioned MGA. The MGA will assist me with specific services when representing Humana products which would include:

MGA Oversight of Agent Activity:

As a contracted partner, Managing General Agencies (MGAs) are responsible for compliance oversight of all downstream agents in their hierarchy. MGAs must assist the agent and ensure the following:

- **Sales and Marketing Agreement** – ensure all policies and procedures are followed by all agents as outlined in the Humana Marketing Agreement which is outline in the contract amendment and Producer Partnership Plan. This includes using the full Humana presentation at each appointment and using only approved recruiting, marketing and advertising materials.
- **Agent Evaluations** – management should periodically schedule evaluations with agents during appointments and sales presentations to ensure adherence to Humana policies and CMS compliance regulations. Humana may at their discretion asked to see evaluations for agents in your hierarchy.

MGA Administrative Services

As a contracted partner, MGAs are responsible for assisting all downstream agents in their hierarchy with administrative services on behalf of Humana. These services may include agent recruiting, training, compliance enforcement and marketing. The minimum services provided are outlined below but the MGA may opt to provide additional services. Audits may be conducted by Humana to ensure to ensure services are being performed.

- Coordinate contracting, licensing, appointing efforts between agents and Humana
- Ensure all agents are properly licensed, appointed, and certified to sell MA and/or PDP products throughout the year
- Assist in coordination of certification classes
- Assist in agents to navigate through Humana’s agent portal
- Reinforce policy updates, compliance alerts, and other communications with agents
- Assist in the maintenance of accurate agent contact information (addresses, e-mail, phone)
- Assist to ensure only approved co-branded marketing and sales materials are used by agents

I understand that if I would like to discontinue my relationship with the above MGA at any time, I will need to follow the Agent Release Policy as outlined in the Producer Partnership Plan.

Peek Performance

MGA Name _____

Agent Name _____

1498257

MGA SAN _____

Agent SAN _____

MGA Signature/Date

Agent Signature/Date