



**R.F.S.**

# **Rosenthal Financial Services, LLC**

7179 Jonesboro Road – Suite # 202 – Morrow, Georgia 30260  
Phone 770-968-5757 – Fax 770-968-2657 – 1-877-968-5757

[www.RealFastService.com](http://www.RealFastService.com)

## **Helpful Hints on Completing Your Downlines Contracting Paperwork with American Amicable.**

- You do not have to pay or submit money for your State Resident Appointment Fee, if this is your time appointing with American Amicable!
- You will need AML, Anti-Money Laundering Training with AA before you can contract. Have your agent go to [www.aatx.com](http://www.aatx.com), and click on “Marketing Sales”. Enter “aml” as agent number and “course” as password. Then hit enter and follow instructions. When finished have the agent print their certificate.
- Always remember to send a copy of your agent’s Insurance License for each state that they wish to appoint in. If contracting as a business and/or agency, the business and/or agency must have an Insurance License as well.
- Always remember to send in a copy of a voided check from your agent for Direct Deposit. (Please note: It is illegal for an Insurance Company to pay commissions to a Non-Licensed entity. Therefore, they can NOT pay Licensed John Smith’s commissions to Unlicensed Sara Jone’s account).

You will begin by printing the blank contract. American Amicable will allow you to give your agents anything you like in 5% increments below your level.

On page one in the boxes provide what percentage on which product you want the agent to have under the commission level. Next to that provide the commission schedule code that corresponds from the commission schedule sheet. (Please note: You will need to write in the Easy UL next to other products).

Under that write in your name and agent number by Agent reports to (Manager).

On the last page of the Agency Agreement, under recommending agency, write in your name, agent number, and which commission schedule codes you are giving to your agent(s).

On the Annualization Plan Supplemental Agreement and ACH Deposit Request page, print your name next to recommending agency name. Next to Advance % write in 75% for a 9-month advance.

Next have the agent complete these pages:

- NEW AGENT CONTRACTING SET UP SHEET
- PRODUCER HISTORY
- AGENCY AGREEMENT
- CONSUMER REPORT NOTIFICATION AND AUTHORIZATION
- W-9
- COMPLIANCE POLICY STATEMENT OF UNDERSTANDING
- Annualization Plan Supplemental Agreement and ACH Deposit Request

Once the agent has completed their information, they should return the contract to you.

Upon receiving the contract back from the agent(s), verify that the agent has completed the appointment paperwork and sent in a copy of their License, a Voided Check, AML certificate, and any other required information.

Under the NEW AGENT CONTRACTING SET UP SHEET, you will sign as the Manager.

On the last page of the Agency Agreement, under recommending agency, sign your name by signature of recommending agency.

On the Annualization Plan Supplemental Agreement and ACH Deposit Request page, sign your name next to signature of recommending agency.

Once the entire contract has been completed you can FAX your contract to 770-968-2657 or postal mail it to:

**Rosenthal Financial Services, LLC**  
7179 Jonesboro Road # 202  
Morrow, Georgia 30260

If you have any questions, comments, or concerns please call me at 770-968-5757, or toll free at 1-877-968-5757. Our office hours are Monday through Thursday from 9:00 am till 4:30 pm (EST), and Fridays from 9:00 am till 3:00 pm. Please note: We will be closed for lunch from 12:00 till 1:00.