



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

Helpful Hints on Completing Your Downlines Contracting Paperwork with United Home Life.

- You do not have to pay or submit money for your State Resident Appointment Fee, if this is your time appointing with United Home Life!
- 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. United Home Life will allow you to give your agents anything you like in 5% increments below your level.

On the second page of the Agent's Appointment Information, provide your name and address next to the recommended by, and print your name and agent number as the Recruiting MGA.

On Contracting/Appointment Transmittal page, provide the contracting level percentage (based on Accidental Death & Provider Levels) you want the agent to be at along with the corresponding commission schedule level.

On the Commission Annualization Agreement, Print your name as the immediate overriding MGA. Also, provide your agent number here. In the box marked for Annualization % write in 75% for a 9-month advance.

Next have the agent complete these pages:

- Agent's Appointment Information
- Contract Appointment Transmittal
- General Agent's Contract
- Commission Annualization Agreement
- Authorization Agreement for Direct Deposit

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, and any other required information.

On the back of the Agent's Appointment Information page, sign as the recruiting MGA.

On the Contracting/Appointment Transmittal page, sign at the bottom as the MGA.

On the Commission Annualization Agreement, sign as the immediate overriding MGA.

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.