

BASIC AGENT INFORMATION

Agent Name _____

E-mail Address _____ Phone Number _____

Date of Birth _____ SSN _____

NPN _____

Do you pay an Agency or yourself directly? _____

If you pay an Agency, are you the Principal Agent? _____

What is the Agency NPN or Tax ID? _____

CARRIERS TO CONTRACT WITH

Choose all that apply:

Under 65
ACA On-Exchange/
Private Off-Exchange

- Anthem of GA
- Ambetter
- BCBS of SC
- BCHP of SC
- Cigna
- Friday Health Plan
- Molina
- Oscar
- UHC
- UHOne

Over 65
Medicare Advantage, Prescription Drug Plans,
and Medicare Supplements

- Aetna Med Advantage/PDP
- Aetna Med Supp
- Aflac
- BCBS of SC
- Humana
- Mutual of Omaha
- UHC-AARP
- WellCare

Do you currently hold appointments with any of the selected carriers? If so, which carriers? _____

Are these appointments direct with the carrier or do you work with an upline FMO? _____

List all states in which to be appointed: _____

NEXT STEPS:

- One of our licensing associates will reach out to you to confirm the carriers you want to get appointed with through The Cason Group and request any additional information depending on your current appointment status with the carriers being requested (appointment transfers from one GA/FMO to another often involve different steps than do new appointments)
- You will receive carrier specific links and/or instructions based on the carriers you want to appoint with.
- Our team will follow up with the broker periodically until the appointment process has been completed.
- Average turnaround time from initiation to completion is 15 days depending on how quickly the agent completes their portion and carrier turnaround times