

HTA Financial's Senior Solutions Call Center

Medicare "Referral" Fee Advisor/Agent Statement of Understanding

HTA Financial Service's Medicare Call Center offers personalized, confidential and professional customer service to your age 65+ clients in need of a Medicare Supplement and/or Medicare coverages. Our trained and licensed representatives will educate and guide your clients through to enrollment in Medicare coverages. They will only discuss Medicare topics and will send them back to the referring agent for non-Medicare questions or concerns. A simple email or phone to HTA with client information starts the referral process.

The referring advisor/agent can be assured HTA Senior Solutions Call Center always has the client's best interests in mind throughout the process. *HTA is looking forward to being your Trusted Resource for all your clients' Medicare needs!*

Referring Advisor/Agent Compensation: \$30 per application placed—this includes clients in their "Open Enrollment Period" and medically underwritten applications. The following situations do not qualify for a referral fee due to decreased commissions and/or commission restrictions:

- UHC/AARP and Blue Cross/Blue Shield (Highmark, IBC, Anthem, CareFirst, etc) cases
- Medicare Advantage & Prescription Drug plans
- High Deductible Plan F
- Under age-65 & "Guaranteed Issue Period" cases

Name of Advisor/Agent: _____ **Telephone#** _____

Referral Fee Payable to: _____ **Tax ID:** _____

Check Mailing address: _____

Signature: _____ **Date:** _____

Received by HTA: _____ **Date:** _____

Fax completed form to 610-430-6652

Important Disclosures: HTA's Senior Solutions Call Center's Referral Service is for referring Medicare Beneficiaries or soon-to-be Medicare Beneficiaries in need to transition to Medicare coverages or other Medicare needs. Medicare Supplement one-time Referral Fees are available to licensed financial advisors and insurance agents only if referred client is sold a "referral fee eligible" Medicare Supplement plan according to Call Center criteria and guidelines. Each client is handled individually and confidentially according to HIPPA, CMS and all State and Federal insurance regulations and guidelines. We will only discuss Medicare products. Due to changing compensation or commissions in the Medicare Supplement Insurance industry, HTA reserves the right at any time to change and/or modify the Referral Fee structure or guidelines—any change or modification will be effective immediately. Financial advisors and insurance agents participating in this Med Sup Referral Fee program can stay up-to-date on referral fee updates, changes, and/or guideline modifications on www.HTAfinancial.com.

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