

Producer Information Form Checklist

If completing this form for an Agency appointment:

- ✓ **Section I should be completed in its entirety.**
- ✓ Section II does not need to be completed.
- ✓ The Agency name should match the name that is submitted on the Agency license.
- ✓ If commissions are to be paid to the agency, the *Tax Identification Number* must be provided as well as an IRS W-9 form.
- ✓ If requesting an appointment in Maryland, the Responsible Individual(s) must be identified and appointed in order for the Agency to be appointed.
- ✓ If requesting an appointment in Pennsylvania, the Qualifying Active Officer(s) must be identified and appointed in order for the Agency to be appointed.
- ✓ If requesting an appointment in Michigan, at least one officer of the agency must be appointed.

If completing this form for an individual Agent or Producer appointment:

- ✓ **Section II should be completed in its entirety.**
- ✓ Section I does not need to be completed.
- ✓ Your name should match the name that is submitted on your Agent or Producer license.
- ✓ If commissions are to be paid to you directly, the *Social Security Number* must be provided as well as an IRS W-9 form.
- ✓ If commissions are to be paid to your agency, the *Agency Name* and *Tax Identification Number* must be provided as well as an IRS W-9 form for the Agency.
- ✓ Section IV must be completed, signed and dated by a business reference.

*If completing appointment paperwork for both an agency and agent or producer, the same Producer Information Form can be used.

For All Appointments the following must be included:

- ✓ Section III and the *Certification and Authorization to Obtain Investigative Consumer Report* must be completed and signed either by you for an individual appointment or by a Partner, Director or Officer for an Agency appointment.
- ✓ Consult Section V for any additional State mandated requirements.
- ✓ A copy of a current valid license for the individual or agency for the state(s) that an appointment is being requested.
- ✓ A copy of the current Errors & Omission Insurance Page or Certification of Insurance for you or your agency.
- ✓ A completed IRS W-9 Form for the Agency, Agent or Producer who is to receive commission payments.
- ✓ An Executed Producer Agreement.
- ✓ Fax, email or mail the completed appointment information via one of the below methods:

Mail:

United Concordia
Attn: Producer Administration
4401 Deer Path Road
Harrisburg, PA 17110

Facsimile:

(717) 433-9871

Email:

UCProducer@ucci.com