

# **MemberCare Alliance<sup>SM</sup> Product Distribution Strategy Participating Producer Benefits and Guidelines**

## **I. MemberCare Alliance Product Distribution**

Chamber-member insurance producers meeting the MemberCare Alliance Participating Producer qualifications and approved by the carrier(s) will be the primary distribution mechanism for products offered through the MemberCare Alliance program.

Only approved Participating Producers will have the opportunity to participate in the MemberCare Alliance production-based lead program and only approved Participating Producers may be included in program advertisements sponsored by the carrier and the Chamber. Participating Producers may also be asked to serve on a producer advisory panel for the purpose of providing input relative to program enhancements.

Carrier representatives will be available to assist approved Participating Producers throughout the sales process. Every effort will be made to protect and enhance the relationship of approved Participating Producers and their clients. Purchasing Alliance Solutions, Inc., (PAS), the sponsoring Chamber and the participating carrier(s) will promote the valuable role of the producer in the distribution process. It should be recognized that some groups will desire to work directly with the carrier and, at the carrier's discretion, they will be free to do so. Additionally, as a condition of the product offering, the participating carrier(s) reserve the right to require product training, set production standards and/or have their representative present at product presentations. This will increase the carrier's comfort level with the representation of their more complex products.

Each carrier shall be responsible for the generation of its own premium rate quotations and will issue proposals in accordance with their established procedures.

In an effort to maintain the most valuable program possible for Chamber member small businesses, PAS and the carrier(s) will conduct periodic surveys of producers and consumers to determine the program's product and price competitiveness in the marketplace.

## **II. Participating Producer Qualifications**

In order to become a MemberCare Alliance Participating Producer and receive the benefits associated therewith, each Producer must submit an application indicating they have satisfied the qualifying criteria and completed carrier contracts. Annual satisfaction of production requirements may be required by the carrier. Participating status will be recognized when the applicant has received approval from the sponsoring Chamber and PAS, and the carrier. Continuous qualification is required.



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The current qualifying criteria are as follows:

1. The producer must be appropriately licensed by the state of Georgia for the products they intend to sell.
2. The producer must hold current Errors and Omissions coverage appropriate for the products they intend to sell.
3. The producer must retain membership in the sponsoring Chamber of Commerce.
4. The producer must retain membership in an insurance industry related professional organization (NAHU, NAIFA, IIAG, PIA, etc.).
5. The producer must commit to attendance of two or more MemberCare Alliance sponsored product/update seminars.
6. The producer must meet any qualifying criteria set by the carrier.

### **III. Producer Compensation**

The participating carriers have agreed that MemberCare Alliance Participating Producers will receive compensation at the carrier's standard commission schedule for products offered.

The participating carriers have further agreed that production into the MemberCare Alliance program will be applied toward the carrier's sales contests and/or producer bonus programs (if any).

### **IV. Production Based Lead Program**

MemberCare Alliance Participating Producers will have an opportunity to participate in an exclusive production-based lead program.

Leads that are received by PAS or the Chamber will be distributed on a rotating basis to MemberCare Alliance Participating Producers. Preference in distribution of leads will be given to Producers who have produced business using the products offered through the MemberCare Alliance program. An actively writing Producer can expect to receive additional leads when available as a bonus for writing MemberCare Alliance business. PAS reserves the right to remove non-producing participants from the lead program. Although a Producer may be removed from the lead program, they will not be prevented from producing business into the program as long as they meet the qualifications of the insurance carrier.

PAS may periodically follow up on distributed leads to determine the competitiveness of the products offered through the MemberCare Alliance program.



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**MemberCare Alliance<sup>SM</sup>  
Participating Producer Application**

Through fulfillment of the requirements below and acceptance as a MemberCare Alliance<sup>SM</sup> Participating Producer, I will be entitled to the benefits outlined in the MemberCare Alliance Participating Producer Benefits and Guidelines document.

**I. Producer Information**

Producer Name: \_\_\_\_\_

Agency Name: \_\_\_\_\_

Agency Address: \_\_\_\_\_  
Street City State Zip

Mailing Address: \_\_\_\_\_  
P.O. Box City State Zip

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**II. Georgia Department of Insurance License and E&O Coverage**

Attach a copy of your current Georgia Insurance License and declarations page from your current E&O carrier.

Check all licenses that apply, and attach copies:  Life  Health  P&C  Securities

**III. Are you a current Chamber of Commerce Member?**  Yes  No

If yes, which chamber and under what name? \_\_\_\_\_

If no, please complete an application.

**IV. Are you a member of an insurance industry related professional organization such as NAHU, NAIFA, IIAG, PIA, etc.?**  Yes  No *If no, complete an application for the organization of your choice and attach a copy of the application and check.*

**V. Do you agree to attend at least two Chamber product training sessions per year?**  Yes  No

I certify that I have met each of the requirements outlined above and make application to become a MemberCare Alliance Participating Producer. I understand that in order to become a MemberCare Alliance Participating Producer I must also meet qualifying criteria required by each carrier and obtain a certificate of authority from each carrier. In compliance with the National Do Not Call and FAX lists, by signing this form I authorize Purchasing Alliance Solutions, Inc., to periodically call, FAX and/or e-mail communications to me. I understand that in the future I may request that these communications be terminated.

Member-Producer's Signature \_\_\_\_\_ Date \_\_\_\_\_

**Mail to: Purchasing Alliance Solutions, Inc.; 736 Johnson Ferry Road, C-200; Marietta, GA 30068**

Phone: 770-579-1214, 800-782-8254 Fax: 770-565-1822, 866-782-8254 e-mail:

info@purchasingalliance.com

Chamber Approval: \_\_\_\_\_ Date \_\_\_\_\_

PAS Approval: \_\_\_\_\_ Date \_\_\_\_\_



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