COMMISSION SET-UP SHEET

COMMISSION ACCOUNT INSTRUCTIONS:	
NEW ACCOUNT SET-UP - Complete ALL sections Send completed form to New Account Service Center (NASC) • newaccountservicecenter@coloniallife.com • FAX: 1-800-543-8573 • Mail Stop Code SC140 NASC will send an e-mail confirmation, which will include the BCN and Commission/Sub Account Number, once the account is set-up prior to the enrollment.	**ACCOUNT MAINTENANCE – Complete sections A, C and D (For all released accounts)** Send completed forms to Sales Compensation Service Center: • salescompensation@coloniallife.com • FAX: 1-888-449-0012 • Mail Stop Code SC433

Maintenance to all roles except the Coordinator Role will require Territory Manager approval.

A. COMPLETE THIS SECTION FOR A NEW COMMISSION ACCOUNT OR CHANGES TO AN EXISTING COMMISSION ACCOUNT:

Account Name: ____

Billing Control Number (existing account): ____________________ Commission or Sub Account Number: ______________________

Indicate commission schedule: CAA Other: ___________________________

****You can indicate any schedule not listed in the "Other" field.**

B. COMPLETE THIS SECTION FOR A NEW COMMISSION ACCOUNT ONLY:

Enrollment Start Date (mm/dd/yyyy) [ ]

Notify the New Account Service Center if enrollment date changes! This date can impact reporting for new account bonuses.

For a new account, indicate individual(s) who receive new account credit. Case count is for a new account only and will not be changed after account setup.

	Name	Agent Code #	% Split (must total 100%)
Case count			

C. COMPLETE THIS SECTION FOR A NEW COMMISSION ACCOUNT OR CHANGES TO AN EXISTING COMMISSION ACCOUNT:

	Name	Agent Code #
GIF Sales Contact		
GIF Service Contact	Cheryl Holm	736952

GIF Sales Contact and his/her manager receive all enrollment level information. GIF Service Contact and his/her manager receive information to service the plan administrator. Brokers are not allowed in either field with the exception of a MAP, DMP and Worksite Specialist.

Effective date of change for an existing account (mm/dd/yyyy) [ ]

Only enter names of individuals here for whom you want to protect the commission assignments and splits. This sheet sets them for the entire enrollment—they are hardcoded and cannot be changed at the Sales Summary level. If no hardcodes are needed, check 'no hardcodes' box.

	Name	Agent Code #	% Split	No Hardcodes
Opener/Maintainer				☐
				☐
				☐
				☐
**Broker				☐
				☐
				☐
Coordinator	Cheryl Holm	736952	100	☐
				☐
				☐

**** The broker role should only be indicated when using the broker commission schedules.**

D. COMPLETE THIS SECTION FOR A NEW COMMISSION ACCOUNT OR CHANGES TO AN EXISTING COMMISSION ACCOUNT:

Signature of DGA_______________________________ ****Email approval is acceptable**** Date (mm/dd/yyyy):____________________

Print DGA Name Charles L. Hernandez Agent Code #____________________

Signature of TSM/VPS____________________________ Print TSM/VPS Name ______________________________