

Unified Life Insurance Company Appointment Instructions

Please note Agents cannot quote or sell in any state until Unified Life Insurance Company has processed their appointment forms and received Approval from the state(s). Simply follow the instructions listed below, based on how you are paid.

Agency:

Agency's that are paid commissions to their legally licensed name and Tax ID must complete the following:

- Agency Owner / Officer must complete and sign Agency Form (Accord 817 is listed in lower left corner.)
- Agency Owner / Officer / Manager must complete the Producer Appointment Data Sheet (Accord 758 is listed in the lower left corner)
- Attach a written explanation and any documents for each question answered "Yes" on the forms
- Attach current copy of E&O Schedule of benefits (Deck page)
- The Agency must indicate the states they plan to sell the Unified Life products in
- Completed forms and attachment's must be scanned and emailed to Licensing@hiiquote.com or faxed to 813-354-2399
- HII will include NPR copies of the Agency / Agent state licenses with the appointment package to Unified Life.

Sub-Agent Producers paid by the Agency must complete:

- Producer Appointment Data Sheet (Accord 758 is listed in the lower left corner)
- Attach a written explanation and any documents for each question answered "Yes" on the forms
- Attach current copy of E&O Schedule of benefits (Deck page)
- The Agent must indicate the states he/she plans to sell the Unified Life products in
- Completed forms and attachment's must be scanned and emailed to Licensing@hiiquote.com or faxed to 813-354-2399
- HII will include NPR copies of the Agency / Agent state licenses with the appointment package to Unified Life.

Individual Agent:

Agent's that HII pays commissions to their legal name and Social Security # must complete:

- Producer Appointment Data Sheet (Accord 758 is listed in the lower left corner)
- Attach a written explanation and any documents for each question answered "Yes" on the forms
- Attach current copy of E&O Schedule of benefits (Deck page)
- The Agent must indicate the states he/she plans to sell the Unified Life products in
- Completed forms and attachment's must be scanned and emailed to Licensing@hiiquote.com or faxed to 813-354-2399
- HII will include NPR copies of the Agency / Agent state licenses with the appointment package to Unified Life.

Unified Life will notify HII when the Agency / Agent state appointments are approved. We will notify the Agency / Agent via email as each state approval is received. The Agents product URL links are automatically updated to quote the state(s) where their appointment is approved. The appointment process should not take more than a few days.

Please feel free to contact our Licensing Department with any questions.

- Toll Free: 877-376-5831
- EFax: 813-354-2399
- Email: Licensing@hiiquote.com