



# Carrier Requested Product Retraining for Agents

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Dear Marketing Agents,

The Claims TPA for Chubb has notified us that several agents may not be representing the product correctly or are stating benefits incorrectly. Chubb is requiring that these agents are re-trained on the Chubb product and sign an acknowledgment document after the training. In addition, Adroit Health Group (AHG) will have expectations and guidelines for subsequent Chubb sales that are outlined below.

## NEXT STEPS: RE-TRAINING

The re-training for the Chubb products will be held **Friday, August 18** at 10:30 AM CST and **Monday, August 21** at 2:30 PM CST. If you are required to attend one of these sessions, you will receive a notice requiring you to attend one of these sessions.

The Acknowledgment Form can be accessed from the link [here](#).

You will receive a Training Session Invitation from Tekela Woods, our Training Specialist. The invitation will include the GoToMeeting web link needed to attend. Again, it is mandatory that you attend one of the designated sessions.

## AHG Guidelines for Future Chubb Sales

AHG and Chubb will be monitoring ongoing sales on a monthly basis. The following process will be implemented to address the severity and frequency in which an agent or agency engages in any misconduct:

### 1. First (1st) Occasion

The agent or agency shall be required to confirm appropriate training and/or education has been provided to address the identified area(s) of concern. It should be noted, that if in the Company's opinion, the conduct is found to be sufficiently egregious the agent or agency may be immediately suspended from engaging in further sale of Company's products or policies. The length of the suspension period shall be determined at the discretion of the Company;

### 2. Second (2nd) Occasion

The agent or agency shall be required to confirm enhanced training and/or education has been provided to address the identified area(s) of concern. It should be noted, that if in the Company's opinion, the conduct is found to be sufficiently egregious and/or the identified act(s) is repetitive in nature, the agent or agency may be immediately suspended from engaging in further sales of Company's products or policies. The length of the suspension period shall be determined at the discretion of the Company;

### 3. Third (3rd) Occasion

The agent or Agency shall be immediately barred from engaging in sales of the Company products or policies.

It is important that you address these complaints as noted, attend re-training, sign the acknowledgment form and send it to Tekela Woods at [Tekela.woods@adroithealthgroup.com](mailto:Tekela.woods@adroithealthgroup.com). If you have any questions regarding this notification, please contact Agent Services at **(800) 319-7061**.

Regards,  
Adroit Health Group