


Cortex Insurance Commission & Incentive Statement

COMMISSION STATEMENT FOR PERIOD ENDED: 06/30/2021

PayeeChange Request

Last Name: Julie
First Name: Evans
ID: 3345523
Account: XXXX-XX-321



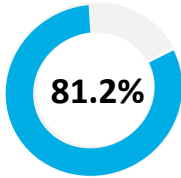
DemographicsChange Request

NIPR: 776009834
Home State: NY
Contracted: 1/15/2015
Business Name: Donaldson & Partners

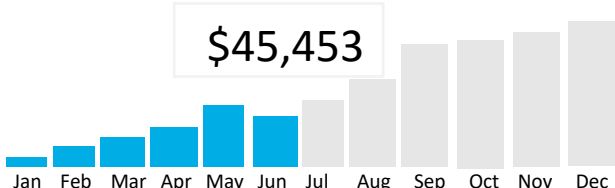
| Payment Summary | This Pay | MTD | QTD | YTD |
|-----------------------|------------|-------------|-------------|--------------|
| Commission | \$2,300.00 | \$16,500.00 | \$26,500.00 | \$143,862.00 |
| Short Term Incentives | \$10.00 | \$10.00 | \$100.00 | \$956.00 |
| Chargebacks | \$-143.50 | \$-380.00 | \$-380.00 | \$-2,188.00 |
| Allowances | \$124.00 | \$368.00 | \$368.00 | \$4,416.00 |
| Total | \$2,290.50 | \$16,488.00 | \$26,588.00 | \$147,046.00 |

Challenger Bonus PlanInquiry

Target Policies: 264
Target Value: \$10,000
YTD Attainment: 216
Attainment %: 81.82
Attained Value: \$8,120.00



Profit Sharing ProjectionInquiry



| Commission Transactions | | | | | | | | | |
|-------------------------|--------------|------------|---------|-------|-----------|------|---------|----------|----------|
| Policy No | Insured Name | Type | Product | Class | Value | Rate | Base | Value | Date |
| NEW BUSINESS | | | | | | | | | |
| 231096-A | Anderson WP | Commission | Auto | STD | \$ 540.00 | 10% | Written | \$ 54.00 | 06/03/21 |
| 231096-A | Anderson WP | Commission | Auto | STD | \$ 540.00 | 10% | Written | \$ 54.00 | 06/05/21 |
| 231096-A | Anderson WP | Commission | Auto | Gold | \$ 540.00 | 10% | Written | \$ 54.00 | 06/10/21 |
| 231096-A | Anderson WP | Commission | Auto | STD | \$ 540.00 | 10% | Written | \$ 54.00 | 06/12/21 |
| 231096-A | Anderson WP | Commission | Auto | STD | \$ 540.00 | 10% | Written | \$ 54.00 | 06/17/21 |
| 231096-A | Anderson WP | Commission | Auto | STD | \$ 540.00 | 10% | Written | \$ 54.00 | 06/28/21 |
| RENEWALS | | | | | | | | | |
| 231096-A | Anderson WP | Commission | Auto | STD | \$ 540.00 | 5% | Written | \$ 27.00 | 06/15/21 |
| 231096-A | Anderson WP | Commission | Auto | STD | \$540.00 | 5% | Written | \$ 27.00 | 06/18/21 |

| Short Term Incentives | | | | | | | | | |
|-----------------------|--------------|------------|---------|-------|-----------|---------|------|----------|----------|
| Policy No | Insured Name | Type | Product | Class | Value | Rate | Base | Value | Date |
| 231096-A | Anderson WP | Commission | Auto | Gold | \$ 540.00 | \$10.00 | Unit | \$ 10.00 | 06/11/21 |

| Chargeback | | | | | | | | | |
|------------|--------------|------------|---------|-----------|----------|------|------------|----------|--|
| Policy No | Insured Name | Type | Product | Reason | Value | Rate | Chargeback | Date | |
| 231096-A | Anderson WP | Commission | Auto | Lapsed-60 | \$287.00 | 50% | \$143.50 | 06/12/21 | |


| Allowances | | | | | | | | |
|--------------------|---------|-----------|---------------|-----------|-----------------|----------|----------|--|
| Description | Add/Ded | Frequency | Initial Value | Balance | This Pay Amount | New Bal | Date | |
| Computer Allowance | Add | Month | \$1,000.00 | \$ 500.00 | \$ 50.00 | \$450.00 | 06/05/21 | |
| Training | Ded | Month | \$2088.00 | \$348.00 | \$174.00 | \$174.00 | 06/06/21 | |

Cortex Insurance Commission & Incentive Statement

ANNUAL EARNINGS ESTIMATE

11/31/2018

Payee

Change Request 

Last Name: Julie
First Name: Evans
ID: 3345523
Account: XXXX-XX-321



Demographics

Change Request 

NIPR: 776009834
Home State: NY
Contracted: 1/15/2015
Business Name: Donaldson & Partners

YTD Actual Earnings FY 2018
Estimated Earnings FY 2018

\$49,400.00
\$108,201.10

Annual Summary

| | Commission | Incentives | Charge Back | Allowances | Total |
|---------------|-------------|------------|-------------|------------|-------------|
| January | \$5,000.00 | \$200.00 | 0.00 | \$150.00 | \$5,350.00 |
| February | \$4,500.00 | \$ 0.00 | 0.00 | \$150.00 | \$4,650.00 |
| March | \$3,000.00 | \$100.00 | -\$100.00 | \$150.00 | \$3,150.00 |
| Q1 Totals | \$12,500.00 | \$300.00 | -\$100.00 | \$450.00 | \$13,150.00 |
| YTD Totals | \$12,500.00 | \$300.00 | -\$100.00 | \$450.00 | \$13,150.00 |
| April | \$5,000.00 | \$200.00 | 0.00 | \$150.00 | \$5,350.00 |
| May | \$4,500.00 | \$ 0.00 | 0.00 | \$150.00 | \$4,650.00 |
| June | \$3,000.00 | \$100.00 | -\$100.00 | \$150.00 | \$3,150.00 |
| Q2 Totals | \$12,500.00 | \$300.00 | -\$100.00 | \$450.00 | \$13,150.00 |
| Q2 YTD Totals | \$25,000.00 | \$600.00 | -\$200.00 | \$950.00 | \$26,250.00 |
| July | \$5,000.00 | \$200.00 | 0.00 | \$150.00 | \$5,350.00 |
| August | \$4,500.00 | \$ 0.00 | 0.00 | \$150.00 | \$4,650.00 |
| September | \$3,000.00 | \$100.00 | -\$100.00 | \$150.00 | \$3,150.00 |
| Q3 Totals | \$12,500.00 | \$300.00 | -\$100.00 | \$450.00 | \$13,150.00 |
| Q3 YTD Totals | \$32,500.00 | \$900.00 | -\$300.00 | \$1,400.00 | \$39,400.00 |
| October | \$5,000.00 | \$200.00 | 0.00 | \$150.00 | \$5,350.00 |
| November | \$4,500.00 | \$ 0.00 | 0.00 | \$150.00 | \$4,650.00 |
| December | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Q4 Totals | \$9,500.00 | \$200.00 | \$0.00 | \$300.00 | \$10,000.00 |
| Q4 YTD Totals | \$42,000.00 | \$1,100.00 | -\$300.00 | \$1700.00 | \$49,400.00 |

Challenger Bonus Plan

| Target Policies | Target Value | YTD Attainment | Attainment % | Value |
|-----------------|--------------|----------------|--------------|------------|
| 264 | \$10,000 | 216 | 81.82 | \$8,120.00 |

Profit Sharing Estimate

| | Premium | Retention | Loss Ratio | Business Quality |
|-------------------|-----------|-----------|------------|------------------|
| Target | 5,000,000 | 96% | <70% | >90% |
| Actual | 3,850,000 | 97% | 63% | 92% |
| Qualified Level 1 | Yes | | | |
| Qualified Level 2 | Yes | | | |
| Qualified Level 3 | No | | | |
| Estimated Bonus | \$45,453 | | | |