

Pivot Contracting Guide

The Guide at a Glance

1 Request your contracts using the customized [AgentContract.com](#).

After you make your requests at [AgentContract.com](#), wait 48 business hours. Then:

2 Medicare Health Benefits will send you an email regarding the contracting process.
You will receive an additional email with contracting links. Click these to move to Step #3.

After Step #2, you can immediately complete Step #3.

3 10

Submit to Contract

Once you submit your contract, wait up to 2 weeks. Step #4 will occur.

will process your contract over the next several days. After everything is processed, you will receive a welcome email.

4 This welcome email will include your unique writing number, indicating that you are ready to sell!

Continue reading the following pages for more details on the contracting process.

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After you request to contract through AC.com, you will receive an email from the Senior Market Advisors Contracting Team with further information on contracting.

Email Example

From: "AgentContract.com Contracting" contracting@seniormarketadvisors.com

Hello Agent!

We are reaching out to you in regards to your request to contract with Pivot Health.

You will receive a unique e-contracting link from contracting@seniormarketadvisors.com within 24-48 hours. Once the link is completed, you will receive a welcome email within 5-7 business days.

If you have any questions or concerns, please email contracting@seniormarketadvisors.com.

Thank you for contracting with Senior Market Advisors.

-Senior Market Advisors Contracting Team

You will also begin receiving contracting links specific to you for the carriers that you requested within 24-48 hrs. These links will be coming from a wide variety of email addresses, so please keep an eye out on your email.

Email Example:

Hi Agent!

We have received your request to contract with Pivot Health. In order to begin the contracting process, please follow the link below.

[Pivot Health Contracting](#)

Number - 13

Thanks!

Note: The contracting link and number are unique to you and will be different than the link in the above example.

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Direct Pay & Hybrid All Carrier W-9 & DD V2



Hierarchy Form/Producer Upline

Please indicate the compensation level for each agent in the hierarchy. The schedule has a number in the footer to define the level for each contract. For example, a compensation level of 15% is a number of 13.

Number - Agent *

Compensation - Agent *

Next

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- Be sure to select "Agency and Tax ID on the commissions form if you would like your commissions paid to your TIN.

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Assignment of Commission Form

Agent Information

I direct my compensation to be made payable as follows: *

- Myself and my social security number
- Agency and tax identification number

prefix *

- Mr.
- Ms.
- Mrs.

Name

First Name Middle Initial Last Name

Maiden or Nickname

Social Security Number (No Dashes) *

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-Upload all insurance licenses and supporting documents for any "yes" responses to background check questions in the corresponding areas.

-Once you are sure all sections have been completed accurately, select Submit.

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Additional State Licensures / Other Documents

Additional Attachment(s)

Please attach your Resident State License, and any Non-Resident State(s) licenses that are being requested. Please attach agency license(s) if you are assigning commissions to an agency tax id.

NOTE: Should the agency already be contracted, it is not necessary to attach agency license(s)

Upload License Files *

 Drag & Drop (or) [Choose File\(s\)](#)

You can add up to 5 files (Max size per file is 20 MB)

If you answered "yes" to one of more questions, please attach supporting documentation in this area. *

 Drag & Drop (or) [Choose File\(s\)](#)

You can add up to 5 files (Max size per file is 20 MB)

Back

Submit

Pivot Health

Pivot Health

Once you receive your writing number, you are Ready to Sell!

Note: It can take between 1-2 weeks to become appointed depending on the time of year.