



Premier Insurance Partners
Principal: Gerald Hraban

United Health One/Golden Rule Contract Request

THIS IS NOT A CONTRACT

Online contracting is now available for United Health One for new agents. To receive a link for the online contract, complete this form. Once this request is received, you will receive an e-mail with a link to complete the online contract from getappointed@unitedhealthone.com and please **check your spam folder** as the e-mail has been known to show there for some agents.

If you are currently appointed with UHOne/Golden Rule, please request transfer paperwork

You can e-mail this form to pharmon@pip1.com

ANY APPLICABLE APPOINTMENT FEES WILL BE REQUESTED DURING THE ONLINE CONTRACT PROCESS

Agent Name _____
Name must be exactly as it is on state license

Social Security Number _____

National Producer Number _____

Address _____

Phone Number _____

Resident State _____

Date of Birth _____

E-Mail Address _____
the e-mail address entered here will be the one the link comes to



STEPHENS-MATTHEWS MARKETING, INC.

„ PO Box 1208 „, Beverly, OH 45715 „, Phone: (800) 544-8250 „, Fax: (888) 984-2614 „,

Return by fax to: 888-984-2614 or email to: Meagan@stephens-matthews.com

Agent Commission Electronic Funds Transfer Form

Agent/Agency Name: _____

Daytime Phone Number: _____

Email Address: _____

Account Type (Please Check One): ☐ Checking Account (22) ☐ Savings Account (32)

TO ENSURE CODING
ACCURACY, PLEASE
ATTACH A **PRE-PRINTED**
VOIDED CHECK

*If you do not have a blank check,
please attach a letter from your
bank, on their letterhead, with the
routing and account numbers
included.*

Joe Smith
1234 Anystreet Court
Anycity, AA 12345

1234

Pay to the order of _____ Dollars

Bank Anywhere

123456789 123456789123 1234

Bank Routing Number Bank Account Number Check Number (Do not use)

_____ Bank Routing Number

_____ Bank Account Number

Authorization

I hereby authorize Stephens-Matthews Marketing, Inc. to initiate credit entries and, if necessary, adjustments for any credit entries made in error to the checking or savings account indicated above, hereinafter called depository.

Agent Signature: _____ Date: _____

Please submit an updated authorization any time you change depositories.

**Commission statements will be available on the
Stephens-Matthews website
www.stephens-matthews.com**

****This form is only needed if you are assigning commissions to either an agency, or to someone other than yourself****



To: Stephens-Matthews Marketing, and/or any other affiliated company (collectively, “the company”).

If and when I am owed compensation because I have sold or secured the sale of an insurance product of the Company or for any other reason, I (the undersigned “Assignor”) do not wish to receive that compensation, but instead assign it to, and direct the Company to pay it to, the person or entity I have written below as Assignee per my instructions below:

Assignee Name (person/entity to be paid)

Social Security/tax ID Number

SIGN HERE

Assignor Signature

Date Signed

Assignor Print Name

Social Security/Tax ID Number

Stephens-Matthews Marketing, Inc. P.O. Box 1208, Beverly, OH 45715 800-544-8250

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-				-	
or									
Employer identification number									
				-					

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.