



Attention: Top Producers

The National Association of Health Underwriters 2008 Leading Producers Round Table

For January 1, 2007 – December 31, 2007 Sales Achievement

Qualification Guidelines

Carrier and General Agency use on behalf of their employee sales force

1. Only health, long-term care, life, AD&D or disability products are eligible (no annuities, P&C, etc.).
2. Self-funded, fee-based, consultants and fully insured business are all eligible.
3. Production:
 - a. New business is considered first year business OR business that you move to a new carrier.
 - b. Retention includes groups and individuals that renew with the same carrier (**subject to point maximum**).
4. Single or family coverage counts as one life.
5. One client with multiple lines of coverage can be counted for each line of coverage.
6. Qualification categories:
 - Carrier/Agency Representatives** — *An employee of an insurance carrier or general agency working with producers*
 - Agency Management** — *Management of a general agency or agency*
 - Carrier/Agency Management** — *Carrier/Home Office/General Agency sales managers, directors of sales & vice presidents of sales*
7. Awards Categories (see LPRT Certification Form, Step 2 for points required):

Leading Producer Qualifier	Eagle
Presidents' Council	Golden Eagle
8. All applications are reviewed and verified by NAHU staff and held in the strictest confidence.

Instructions to Managers of Candidates

- A. PREREQUISITE FOR QUALIFICATION:** All candidates must be a member in good standing of the National Association of Health Underwriters. If a candidate is not a NAHU member, then a membership application must be completed and sent to NAHU along with the applicable dues for both LPRT[®] and NAHU. The national portion of dues is \$145 per member. Please call Brooke Willson at 703- 276-3812 to determine the correct amount for the state and local portions of the NAHU dues. To qualify for any sales production award, production for the applicant must be verified by superior or sales manager.
- B. APPLICATION PROCESS:** Complete the Carrier and General Agency LPRT Certification Form and the Agency Fee Schedule form. Include your LPRT membership dues: (See the Fee Schedule page for a Multi Award Discount.)
- | | |
|--|---------------------------------------|
| Leading Producer Qualifiers: \$50 | Eagle Qualifiers: \$100 |
| Presidents Council qualifiers: \$75 | Golden Eagle qualifiers: \$125 |
- INCOMPLETE OR INCORRECT FORMS WILL BE RETURNED*
- C.** All completed forms must be postmarked by March 31 of each year for recognition at the National Convention and participation in the annual event.



LPRT Carrier and General Agency POINT CALCULATOR WORK SHEET

To determine the Award level the candidate is eligible for, simply fill in the blanks below, calculate the total and then match that total with the appropriate category in Step 2 of the LPRT Certification form.

<u>Classifications</u>	<u>Points/Life x Total Lives</u>	<u>Carrier/Agency</u>	
		<u>Representative</u>	<u>Sales Manager</u>
Individual			
Disability	6 x _____ =	_____ Points	_____ Points
Long-Term Care,	6 x _____ =	_____ Points	_____ Points
Medical	4 x _____ =	_____ Points	_____ Points
Medicare Products (HMOs, PPOs, Supplements Medicare Part D)	2 x _____ =	_____ Points	_____ Points
Dental	2 x _____ =	_____ Points	_____ Points
Life Insurance	2 x _____ =	_____ Points	_____ Points
Vision	2 x _____ =	_____ Points	_____ Points
Critical Illness, Cancer, Accident	3 x _____ =	_____ Points	_____ Points
Group			
Disability (LTD & STD)	3 x _____ =	_____ Points	_____ Points
Long-Term	3 x _____ =	_____ Points	_____ Points
Medical Insured	4 x _____ =	_____ Points	_____ Points
Dental Insured	2 x _____ =	_____ Points	_____ Points
Life Insured	2 x _____ =	_____ Points	_____ Points
Vision Insured	2 x _____ =	_____ Points	_____ Points
Voluntary Worksite Marketing Products (LTC, Accident, Critical Illness, Cancer, Dental, Disability, Etc.)	3 x _____ =	_____ Points	_____ Points
Self-Insured TPA & Stop Loss	4 x _____ =	_____ Points	_____ Points
COBRA/HIPAA Administration	4 x _____ =	_____ Points	_____ Points
Retention			
Group Products	1 x _____ =	_____ Points*	_____ Points** ***
Individual Products	1 x _____ =	_____ Points*	_____ Points** ***
		_____ Total	_____ Total

* Maximum total retention points for Carrier Representative production is 2,000.

** Maximum total retention points for Agency Management 5,000.

*** Maximum total retention points for Carrier Management production is 15,000.

This worksheet does not need to be submitted to NAHU with the certification forms.



Carrier and General Agency LPRT Fee Schedule

FEE SCHEDULE

1. Please indicate the number of applications attached. _____
2. Please indicate the number of each type of award submitted and amount due.
3. Submit this form with your payment and the LPRT Certification Forms.

Award Selection

	<u>Number of Candidates</u>	<u>Fee</u>	<u>Total</u>
Golden Eagle	_____	x \$125	_____
Eagle	_____	x \$100	_____
Presidents' Council	_____	x \$ 75	_____
Leading Producer Qualifier	_____	x \$ 50	_____
Total Awards:	_____		Sub Total: _____

Multi Award Discount

For at least 5 but not more than 9 candidates:	.95 x Sub Total	_____
If the number of candidates total 10 or more:	.90 x Sub Total	_____
Submit check or credit card information for the grand total of:		_____

Form of Payment Enclosed:

Check (Payable to NAHU)

Credit Card:

Name as it appears on credit card: _____

Account Number: _____ Exp. Date: _____

Type of Credit Card: Visa MC AMEX Discover

Signature for Credit Card: _____