

Producer Compensation Disclosure Worksheet

Customer Name: _____

1. I choose to disclose to the customer: Written Verbally

2. Name of Insurer Company: _____

3. Source of compensation for the placement of this insurance: _____

4. Have I disclosed that I represent the insurer above and will be providing services to the customer on behalf of that insurer? Yes No

5. Is this compensation coming from the insurer's parent company, affiliate or other third party that is not the insurer company above? Yes No

If yes, list source and relationship: _____

For insurance producers that are acting as brokers or are receiving compensation from the customer:

6. Are you receiving additional compensation from the insurer or other third party? Yes No

I am disclosing the compensation information to the customer before he or she commits to purchasing insurance or annuities.

Agent signature: _____

Date of Disclosure: _____

Notes: _____

The above compensation was disclosed to me as documented on this worksheet.

Customer Signature _____ Sign Date _____