

Individual Referral Program

Overview

Flexible Benefit Service Corporation (Flex) offers a value added service to Waddell & Reed Financial Advisors. We provide the opportunity for you to refer Individual Health, Short-Term Medical and Dental prospects to Flex. In return, our team of licensed and certified representatives will facilitate all pre-sale and post-sale support for your clients. We will interface directly with the referred individual(s) allowing your agency to focus on other core product lines and services that you provide.

Fee Structure

We do not charge a fee for the establishment or maintenance of the referral program. Our model incorporates a referral fee on all policy sales. Compensation for all policy sales is made to Flex.

Value Added Services

Our services are designed to enhance the overall customer experience and provide the best possible insurance solutions to your clients. Some of the value added services we provide are listed below:

- Quoting
- Application Processing
- Customer Support

- Renewal Support
- Plan Changes
- General Product Questions

Individual Referral Program

Individual Health Plans

\$100 per policy

Excludes Short-Term Medical, CHIPs, IPXP, Dental, Vision



Notes

These are the gross amounts paid to W&R by Flex. The net pay to advisors will depend on individual production tiers. Commissions are paid 90 days from issuance. Subject to change. Restrictions apply.

Other Individual Plans

\$25 per policy

Short-Term Medical

\$25 per policy

Dental



Contact Us Today

(866) 472-0889

waddell@flexiblebenefit.com