

Broker/Agent of Record Change Policy

Aetna Advantage Plans for Individuals, Families and the Self-Employed

Broker/Agent of Record changes or termination letters will be processed effective the first of the month following receipt, unless a future date is designated in the actual letter.

The effective date is dependent on the new agent's satisfaction of any/all licensing and appointment requirements for the contract state of the applicant.

Note: This policy is effective for all effective dates January 1, 2008 and later. For cases effective prior to January 1, 2008, Broker of Record changes are accepted and the new broker becomes the paid broker the first of the month following the request.

Broker of Record correspondence or e-mail must be signed, dated and submitted by the member

Correspondence must include:

- Aetna Member ID, Application ID or Billing ID number
- Reason for the broker of record change
- New broker name and identifier (TIN or National Producer Number)

Correspondence should be submitted to the Broker Support Mailbox at AIMbrokersupport@aetna.com or can be faxed to **1-866-530-8157**.

The original broker on the application will be known as the paid broker

- The paid broker will remain in force for the duration of the policy.
- The paid broker will continue to receive any/all commissions, bonuses or incentives, in accordance with the commission schedule for the state of the subscriber.
- The paid broker will no longer receive rate action notifications.

The new/replacing broker will be known as the servicing broker

- The servicing broker will not receive commissions, bonuses or incentives for the policy.
- The servicing broker will receive rate action notifications, in accordance with the notification schedule for the state of the subscriber.

Did you know?

In cases where both the paid and servicing broker are in agreement, we will make the servicing broker the paid broker. As the new broker, you must provide a letter signed by the client and both brokers requesting the change. The change will be effective 1st of the month following receipt of the request.