

Tuesday, January 9, 2024 at 09:42:32 Central Standard Time

Subject: FW: Aetna Sold Docs and Process- Samples of all documents
Date: Tuesday, January 2, 2024 at 2:31:13 PM Central Standard Time
From: wmorrissey@chcquotes.com
To: 'Jan Ash'
Attachments: image002.png, image003.png, sold_case_submission_process.pdf, AFA_Employer_Application_1.pdf, NB474_NY_HCRA.xls, Aetna-Funding-Advantage-Banking-Consent Form.pdf, AFA_Billing_Banking_Handbook.pdf, aetna_new_sales_notification.pdf

Fyi...

From: Amy Bombino <amy.bombino@amwins.com>
Sent: Tuesday, January 2, 2024 2:12 PM
To: pdavis@chcquotes.com
Cc: wmorrissey@chcquotes.com
Subject: Aetna Sold Docs and Process- Samples of all documents

Hi Peggy,

Here is a sample of ALL of the Aetna sales paperwork. The items highlighted in blue below would be sent in an email in the form of an Adobe sign document.

Below and attached are the Aetna Sold Docs and Process:

What do we need?

- *Sales notice*
- *Signed proposal (no fancy autographs, initials are fine)*
- *One Census*

The Aetna Sales Coordinator then sends out paperwork (*Employer Apps, NY HCRA form, Banking agreement*) via Adobe and as soon as that is completed, the group is finalized and moved to underwriting.

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We help you win!!

Please leverage "Team Amy" acis.teamamy@amwins.com when you email me or when submitting RFPs. By including this address you will have access to your entire Broker Sales Representative (BSR) Team.

Please send all 51+ & Level Funded RFPs to: Large Group SE acis.largegroupse@amwins.com and copy the Team Amy address.

The latest Amwins Connect Quarterly Compliance Digest is here! [Download it today](#)

[Broker Compensation Disclosure – Amwins Connect Toolkit](#)



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