



Aetna[®]

A Place to Call Home

Small Group producer program

Stronger together

We're pleased to offer you extra incentives to ease your clients' transitions through our A Place to Call Home incentive program.

Earn credits when you sell Aetna Funding AdvantageSM or fully insured plans. **That's on top of the credits you already earn under our other producer incentive programs.**

Cases sold	Per subscriber
1 to 9	\$50
10 to 39	\$100
40+	\$150

About the program

- Eligible medical plans and funding arrangements on the Aetna platform include:
 - Aetna Funding Advantage plans with 2 to 100 eligible employees.
 - Fully insured plans with 51 to 100 eligible employees.
- Applicable to plan sponsors impacted by the carrier exiting the market.
- Covers effective dates from May 1, 2023 through October 31, 2024.
- Payments will be adjusted retroactively to apply to all sold business under this program when the producer sells more business and achieves higher tiers.
- We will pay credits quarterly by the end of the following quarter.

Ready to earn more? Contact your Aetna sales professional.

Program guidelines to keep in mind

Program term

- Effective dates May 1, 2023 through October 31, 2024.

Eligible participants

- Must be licensed and appointed (where required) and have an in-force Producer Agreement.
- Qualification will be tracked at a state level; business will not be combined across states.
- General agents are not eligible to participate.

Eligible business

- New business in Aetna Funding Advantage plans with 2 to 100 eligible employees or fully insured plans with 51 to 100 eligible employees on the Aetna® platform.
- Includes both commissionable and non-commissionable business.
- The relationship between the producer and plan sponsor must be documented to our satisfaction.
- Must be new business to Aetna (conversions are not eligible).
- The primary producer is eligible for payment on business sold through a general agent.
- Credits earned will be in addition to those earned under our national incentive programs.
- Limited to business impacted by the exit of current carrier from the market.

Exclusions

- Professional Employee Organization plans, Medicare plans, Aetna Affordable Health Choices plans, Aetna Student HealthSM plans and the Aetna Signature Administrators[®] network are excluded from this program.
- Program may not be available in all geographic regions. Joint venture cases in Texas and New York situated fully insured cases are not eligible for payment under this program.

Disclosures

- Producer is required to provide advanced written disclosure to customers on the nature of the compensation that the producer may be entitled to receive from us.
- Credits outlined in this document are not charged to the customer's experience-rated contracts but will be disclosed in accordance with our producer compensation disclosure policy.

- More details can be found by accessing our standard Producer Agreement at <https://www.Aetna.com/insurance-producer/become-appointed-with-aetna.html>

Payments

- We will pay credits quarterly by the end of the following quarter.
- Credits will be reported as taxable income.
- Payments will be submitted under one tax identification number (TIN). We will not split payments to multiple brokers or TINs.
- Any disputes about payments must be received in writing within 90 days of payment release.

Final determinations

- This program is offered at our sole discretion and we can terminate or modify it at any time and without notice. Any subsequent program is at our discretion. We may modify programs and compensation to comply with state law, regulations or approvals.
- Our records determine producer's final results and will be the only basis for determination of qualification, calculation and payment of credits. Our decisions are final.

Engagement credit guidelines

To receive engagement credits or an engagement credit payment you must provide at least one of the following services:

- Electronic enrollment submission.
- Full access to claims data from current/incumbent carrier.
- Access to plan sponsor's management team to help facilitate stronger employee engagement.
- Member assistance with plan selection and cost estimator or access to cost and quality-of-care decision support tools such as the Aetna Personal Health Record, Simple Steps to A Healthier Life[®] program, Aetna SmartSource search tool, an online provider search function and a cost estimator tool to name a few.

Aetna is the brand name used for products and services provided by one or more of the Aetna group of companies, including Aetna Life Insurance Company (Aetna).

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