



Pennsylvania & Delaware

Conversion bonus

For agents who convert existing UnitedHealthcare fully insured medical plans to level funded plans with up to 50 eligible employees



UnitedHealthcare is offering a bonus to agents who convert existing UnitedHealthcare fully insured medical plans to UnitedHealthcare level funded medical plans with up to 50 eligible employees with effective dates from May 1, 2025, through January 31, 2026.

Eligible cases are existing UnitedHealthcare fully insured medical groups (who convert to UnitedHealthcare level funded) with up to 50 eligible employees with effective dates from May 1, 2025, through January 31, 2026. Only existing UnitedHealthcare fully insured groups located in Pennsylvania or Delaware are eligible for this bonus.

Agents will receive a one-time special bonus of \$750 for each existing eligible medical group that converts from fully insured to UnitedHealthcare level funded during the bonus period.

Bonus Example: An eligible agent converts four eligible medical groups with effective dates during the bonus period. That makes the agent eligible for a bonus of \$750 for each of the four eligible medical groups, for a total bonus of \$3,000.00.

Program details:

1. Groups eligible for this bonus are existing UnitedHealthcare fully insured medical groups (who convert to UnitedHealthcare level funded) that:
 - a. Have up to 50 eligible employees;
 - b. Have effective dates from May 1, 2025, through January 31, 2026; and
 - c. Are located in Pennsylvania or Delaware.
2. All business must be active and the selling agent must remain the Agent of Record on January 31, 2026, to be included in the bonus calculations.
3. The enrolled employee counts will be derived from the medical plan only and will be based on the number of enrolled medical employees as of the group's effective date. UnitedHealthcare's determination of group and enrolled employee count is final.
4. Classification as a group "with up to 50 eligible employees" is determined by us considering several factors, including the enrollment at some point in time. We reserve the right to classify groups according to our rules, regardless of a group's actual enrollment at any time.

5. All bonus payments will be made to the agent or agency to which the commissions are paid. The bonus will be paid after the bonus period is over and when all information required for verification of enrollment data and calculation of the bonus is available.
6. For dual or multiple broker arrangements, enrolled employee credit for payment calculations will be allocated in the same proportion as the commissions or fees are split on the case. Fractional credits will be used in the calculation, and credits will not be rounded to the nearest integer.
7. General Agents are not eligible for the bonus.
8. We require written customer or agency acknowledgment before removing any customer from bonus eligibility. Any limits on compensation in the RFP, RFI, bid specifications or other written instructions for governmental entities cannot be exceeded. Please refer to the Producer Compensation Policies and Practices in the Producer Performance Guide for more information. All bonus compensation will be reported as required for regulatory requirements.

All terms and conditions of the UnitedHealthcare Agent/Agency Agreement and the Producer Performance Guide apply to all compensation programs. This Bonus Program is offered at the sole discretion of UnitedHealthcare and can be terminated or modified by UnitedHealthcare at any time and without notice.

Please refer to the Producer Compensation Policies and Practices in the Producer Performance Guide for more information.

