



Pennsylvania & Delaware

New sales bonus

For agents who sell new Surest level funded medical plans with up to 50 eligible employees



UnitedHealthcare and Surest are offering a bonus to agents who sell new Surest level funded medical plans with up to 50 eligible employees with effective dates from May 1, 2025, through January 31, 2026.

Eligible cases are new Surest level funded medical groups located in Pennsylvania or Delaware with up to 50 eligible employees with effective dates from May 1, 2025, through January 31, 2026.

Agents will receive a one-time special bonus of \$75 for each enrolled employee in new eligible Surest level funded medical plans sold during the bonus period.

Bonus Example: An eligible agent sells three eligible medical groups having a total of 40 enrolled employees in a eligible Surest level funded plan with effective dates during the bonus period. That makes the agent eligible for a bonus of \$75 for each of the 40 enrolled employee in the three groups, and therefore they earn a bonus of \$75 times 40, for a total bonus of \$3,000.00.

Program details:

1. Groups eligible for this bonus are new Surest level funded medical groups 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 sold 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 Surest level-funded 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. Cases transferring into the eligible segment from another UnitedHealth Group subsidiary, business segment or case size segment will not be considered new business for this bonus program. Agent of Record changes on existing UnitedHealthcare cases will not be credited as eligible business for this bonus program.
9. 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. Fully insured medical Enrolling Units located in New York are excluded from this bonus program. 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.

