

Sample Agent of Record Change Letter-

UnitedHealthcare will accept customer requests to change the Writing Agent and Agent of Record provided that the request:

- Is made in writing by an authorized representative of the customer on the customer's letterhead
- Is directed to UnitedHealthcare (not the new Agent of Record);
- Designates the new Writing Agent and Agency of Record using the names by which they are appointed by us; **including the Tax ID# of the payee or SSN for direct agents**, and instructs to pay commission if applicable
- Specifies the lines of coverage impacted and;
- States the assignment rescinds and supersedes all previous agent appointments

The language in the following sample Agent of Record change letter meets our requirements and may be used by customers to change the agent assigned to their case.

[Must be on customer letterhead]

[Date]

UnitedHealthcare
Broker Commissions
400 Capital Blvd. 2nd Floor
CT040-1000
Rocky Hill, CT 06067-3576

Re: Policy number(s): _____

Dear UnitedHealthcare,

On [date] we have appointed [Agent name] at [Agency name, if applicable] with [Tax ID#] as our exclusive insurance agent for [all lines of coverage (or specific lines of coverage)].

The appointment of [Agent] [and Agency name, if applicable] rescinds and supersedes all previous agent appointments and shall remain in force until canceled in writing.

I understand that you will make this appointment effective on the first of the month following your receipt of this letter, and that once effective all commissions and other compensation payable from that date on will be paid to the agent appointed in this letter. I represent that I am authorized to appoint an agent for the lines of coverage that are included in this letter.

Sincerely,

- *Must be signed by an executive or officer who has authority to sign legal documents*
- *Name, Title and Phone Number of the person signing the letter is required.*