

R.F.S.

Rosenthal Financial Services, LLC

7179 Jonesboro Road – Suite # 202 – Morrow, Georgia 30260

Phone 770-968-5757 – Fax 770-968-2657 – 1-877-968-5757

www.RealFastService.com



I nsurance

Helpful Hints on Completing Your Downlines Contracting Paperwork with Foresters.

- You do not have to pay or submit money for your State Resident Appointment Fee, if this is your time appointing with Foresters, unless in Connecticut or New Mexico!
- You will need AML, Anti-Money Laundering Training for Foresters before you can contract.
- Always remember to send a copy of your agent's Insurance License for each state that they wish to appoint in. If contracting as a business and/or agency, the business and/or agency must have an Insurance License as well. If contracting in Connecticut, New Mexico, or Massachusetts you must have a Fraternal License, A Life License will NOT do!
- Always remember to send in a copy of a voided check from your agent for Direct Deposit. (Please note: It is illegal for an Insurance Company to pay commissions to a Non-Licensed entity. Therefore, they can NOT pay Licensed John Smith's commissions to Unlicensed Sara Jone's account).

You will begin by printing the blank contract. Foresters will allow you to give your agents anything you like in 5% increments below your level.

On page five, section 15 (Reporting Hierarchy), provide your name as the recruiter and your agent number as the producer number.

On page five, section 16 (Compensation Details), the percentage you want the agent to be at along with the corresponding commission schedule.

Below that decide if you want the agent to be paid daily or weekly. Also, provide if you would like them advanced or as earned (we usually leave this decision to the agent).

Next have the agent complete these pages:

- Application for Contract and Appointment
(Sections 1 through 14)
- W-9
- General Agent Agreement (remember the signature as General Agent)
- Advanced Commission Addendum

Once the agent has completed their information, they should return the contract to you.

Upon receiving the contract back from the agent(s), verify that the agent has completed the appointment paperwork and sent in a copy of their License, a Voided Check, AML certificate, and any other required information.

Under Page 5, Section 17 (Recruiter Approval), sign and date as the recruiter.

At the bottom of the Advance Commission Addendum, sign as the Supervising General Agent. (The Title is your name).

Once the entire contract has been completed you can FAX your contract to 770-968-2657 or postal mail it to:

Rosenthal Financial Services, LLC

7179 Jonesboro Road # 202

Morrow, Georgia 30260

If you have any questions, comments, or concerns please call me at 770-968-5757, or toll free at 1-877-968-5757. Our office hours are Monday through Thursday from 9:00 am till 4:30 pm (EST), and Fridays from 9:00 am till 3:00 pm. Please note: We will be closed for lunch from 12:00 till 1:00.