

BONUS PROGRAM

CalCPA Health New Sales Incentives

Sell more—earn more!

Steps to start earning:

- Sell two or more new group subscribers with effective dates 10/1/2017 to 1/1/2018
- See the table below to track your potential earnings at the tier level achieved

Bonus Program Payout Tiers

# of Subscribers	Bonus per subscriber
2– 20	\$50
21-50	\$100
51-99	\$150
100+	\$200

Please call your CalCPA Health sales representative at 650-522-3251 for more information.

See reverse for program guidelines.

CalCPA Health reserves the right to change or terminate this program at any time.

Program Guidelines

Group/membership eligibility

- A Small Group consists of 2 + employees; groups and subscribers/primary insureds must be active at the end of the program period for brokers to be eligible for payment.
- New Small Business Group subscribers/primary insureds are those who have the same enrollment effective date as the employer group's original CalCPA Health effective date (i.e., if an employer group's original effective date is 4/1/2017, then the new subscribers/primary insureds, must also have an effective date of 4/1/2017).
- Bonus is based on the number of subscribers/primary insureds with a CalCPA Health medical plan. Enrollment in dental, vision, prescription drug, or life insurance plans, or covered by COBRA or other continuation, is not counted for bonus eligibility.
- Eligible business: CPA /Accounting Firms or related financial businesses.

Broker eligibility

- Participating brokers must be in good standing with a current, signed CalCPA Health broker contract and valid license on file (or submitted with case).
- To be credited, a broker must be the broker of record at the time the program ends.
- Credit for a group business submitted by a general agent will be credited to the individual broker.
- Results will be determined 40 to 50 days after the program ends. Membership numbers as of the date of the qualifying period report will be used to compute bonus payouts and will be considered final.
- Payments will be made within 75 days of the end of the program, and payments will be reported with the submission of forms 1099 and 5500.

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