



Presbyterian Health Plan ■ Presbyterian Insurance Company, Inc.
Prospective Agent Appointment Interview Form

Date:

Agent Information

Agent Name:

Agency Name:

Phone Number:

Address:

City, State, Zip code:

Agent Qualifications

1. How long have you been a licensed insurance Agent in New Mexico ?

2. Which of Presbyterian products are you most interested in? (large group, small group, individual plan, Medicare)

3. What types of license(s) do you currently hold? (ie: Health, Life, HMO)

4. Does this agency currently have Agents appointed with PHP/ PIC?

5. How long have you been with this agency?

6. Have you ever been appointed with PHP/PIC under a different agencies? (if yes, please give the name of the agencies, the dates you were with them and the reason for leaving.)

7. Is this appointment to permit you to solely write insurance for yourself, your employees, a friend or a family member?

8. What carriers do you currently represent? (Please provide a general idea of your book of business with each carrier.)

9. What is your business plan for our market for the next 1- 3 years? (Please give a detailed description of your business plan. You may attach a separate sheet if necessary.)



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10. Are you interested in Medicare programs? (if yes, please provide your history with Medicare)

11. Are you willing to participate in the training program for Medicare to become a Select Agent?

12. Are you willing to participate in a training program for PHP and PIC products and services?

13. Do you have Errors and Omissions Insurance? (if yes, indicate the amounts of liability)

14. What Certifications do you hold ? (Alliance, Medicare Advantage, SCI)

15. Will commissions be paid directly to the agency?

16. Please attach any References you may have.

17. Are you on the Agency Corporate License?

Please be advised that Presbyterian Health Plan / Presbyterian Insurance Company, Inc. (PHP/PIC) cannot pay commissions until all licensing and appointing is approved and completed as stated below in the New Mexico Division of Insurance Code. Appointment requests are reviewed once every quarter. If approved for appointment with PHP/ PIC, commissions will be paid the first of the month following licensing and appointment completion and cannot be paid retroactively.

Chapter 59A. Insurance Code Article 12. Insurance Agents, Brokers and Solicitors.

No authorized insurer shall accept insurance of any subject located, resident or to be performed in this state through any person acting as insurance Agent in this state if the insurer knows, or reasonably should have known, that such person was not then licensed as an Agent as to such insurance or not appointed as its Agent by the insurer.

No Agent or solicitor shall solicit or take an application for, or place for others, any kind of insurance as to which not then so licensed.

No Agent shall place any insurance with any insurer as to which not then licensed or appointed as Agent under the Insurance Code.

**Thank you for your interest in Presbyterian Health Plan/Presbyterian Insurance Company, Inc.
Please send your completed interview sheet to the person listed below:**

Anna Walker
Sales Operations Coordinator
PHP Commercial Sales
awalker3@phs.org
(505) 923-8180
(505) 923-8163 fax

Presbyterian serves to improve the health of individuals, families and communities.
