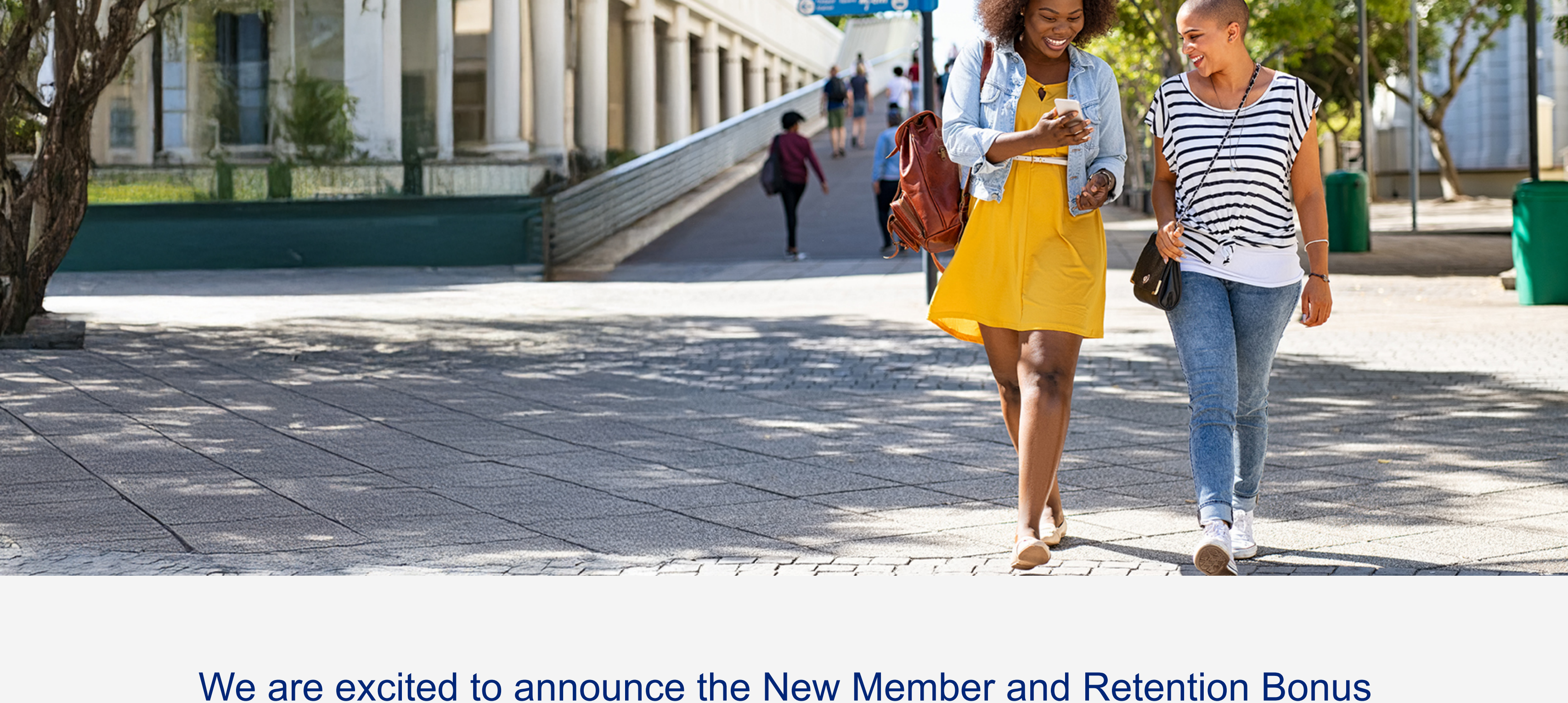


# 2025 New Member and Retention Bonus Programs



We are excited to announce the New Member and Retention Bonus Programs for 2025. The New Member Bonus Program applies to all new sales, and the Retention Bonus Program applies to applicable renewals for UnitedHealthcare Individual & Family Exchange plans effective in 2025.

## Payment Structure

### New Member Program

Alabama, Arizona, Colorado, Florida, Georgia, Illinois, Indiana, Iowa, Kansas, Louisiana, Maryland, Michigan, Mississippi, Missouri, Nebraska, New Jersey, New Mexico, North Carolina, Ohio, Oklahoma, South Carolina, Tennessee, Texas, Virginia, Washington, Wisconsin, Wyoming

Bonus levels	Bonus amount per member
0-24 new members	\$0
25-49 new members	\$25
50+ new members	\$50

### Retention Program

Alabama, Arizona, Colorado, Florida, Georgia, Illinois, Kansas, Louisiana, Maryland, Michigan, Mississippi, Missouri, New Jersey, New Mexico, North Carolina, Ohio, Oklahoma, South Carolina, Tennessee, Texas, Virginia, Washington, Wisconsin

Retention levels	Bonus amount per retained member
0-49 retained members	\$0
50-99 retained members	\$25
100+ retained members	\$30

## Program Details

### New Member:

- New Member Bonus Program applies to new members not enrolled in UnitedHealthcare QHP in December 2024
- New Member Bonus Program membership will only qualify for payment one time in a plan year
- New Member Bonus Program applies to sales of UnitedHealthcare Individual and Family Plans as measured per state in AL, AZ, CO, FL, GA, IA, IL, IN, KS, LA, MD, MI, MO, MS, NC, NE, NJ, NM, OH, OK, SC, TN, TX, VA, WA, WI, WY with Jan. 1, 2025, through Dec. 1, 2025, effective dates
- All New Member Bonus Program payments will be calculated each month by the total number of UnitedHealthcare Individual & Family Plan new active members within each state. New business qualification levels will reset at the end of each month
- New Member Bonus Program payments will be made by the last week of each month, starting May 2025 through December 2025

### Retention:

- Retention Bonus Program applies to membership enrolled in a UnitedHealthcare Individual & Family plan in AL, AZ, CO, FL, GA, IL, KS, LA, MD, MI, MO, MS, NC, NJ, NM, OH, OK, SC, TN, TX, VA, WA, WI as of Dec. 31, 2024, who remain enrolled through April 1, 2025

## Additional Program Details

- All payment amounts listed above are a one-time bonus payment per effectuated member in the program year
- There is no cap on the New Member Bonus Program or Retention Bonus Program
- Enrollments and membership are measured at the individual NPN level
- All eligible UnitedHealthcare Individual & Family plans must be in force for a minimum of 4 months from the effective date to count as “issued.” Coverage must be in force with premium payment current at the time of contest payout to be included. If coverage is terminated for any reason prior to 4 months, the broker will be charged back for any difference if it alters the bonus amount paid
- Bonus Programs apply to both On- and Off-Exchange business
- If a broker or agent assigns commissions to another agent or agency, the Bonus Program payments will be paid in accordance with our standard commission payout practices
- Broker or agent must meet all compliance requirements and be appointed by the applicable UnitedHealthcare carrier in each of the respective program states to be eligible for these Bonus Programs
- In order for the upline Agency to be paid for downline activity as related to Bonus Programs, the downline broker or agent must meet all eligibility and compliance requirements above

## Payment Schedule

### New Member:

#### January Payment

For new members newly effective January 1, 2025, Bonus Program payments will be made the last week of May 2025.

#### February – July Payment

For active members newly effective each month from February 1, through July 1, 2025, Bonus Program payments will be made monthly, the last week of June through November 2025, respectively.

#### August – December Payment

For active members newly effective each month from August 1, through December 1, 2025, Bonus Program payments will be made the last week of December 2025.

### Retention:

Retention Bonus Program payments will be made no later than May 30, 2025.



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