



General Agent Contract Checklist

Individual/Entity Name: _____

REQUIRED DOCUMENTS FOR CONTRACTING

- General Agent Agreement – Return Signature Page Only**
 - Signature Page Signed & Dated
 - Full Name Printed or Typed
 - Tax Identification Number Section Completed
 - Certification Section Completed, Signed & Dated

- Background & Information Sheet**
 - Personal Section Completed
 - Business Section Completed
 - Errors & Omissions Information Completed
 - Background Experience Questions 1 and 2 Answered
 - Answering “YES” to either question requires a written, signed and dated explanation.
 - Signed & Dated

- Fair Credit Reporting Act Disclosure**
 - Signed & Dated

- Check Deposit Authorization (Optional)**
 - Completed, Signed & Dated
 - Voided Check or Deposit Slip Attached

- Current State Licenses**
 - ALL States in Which General Agent Will Be Soliciting Business
NOTE: For contracted entities who will not sell, solicit, negotiate or hold themselves out as an insurance agency, no license is required except in the following states:
 - Corporations: GA, KY, MA, MS, MO, MT, PA, PR, TX, UT, VA, WV
 - Individuals: FL, GA, KS, KY, MA, MS, MO, MT, NC, PA, PR, TX, UT, VA, WV

- Long Term Care Continuing Education Certificate (If Applicable)**

- State Appointment Form (Non-Resident Hawaii Only – 2 Originals)**

PLEASE NOTE

ALL MATERIALS MUST BE RETURNED TO YOUR MASTER GENERAL AGENCY TO CONTINUE THE CONTRACTING PROCESS

MGA Use Only:

Completed Transmittals for Appropriate Company:

- Mutual (Health Products – All States)
- United (Life & Annuity Products – All States Except NY)
- Companion (Life & Annuity Products – NY Only)
- United World (Health Products)- Refer to UW Transmittal for approved states

Mail To: Mutual of Omaha
Mutual of Omaha Plaza
6 – Appointments & Contracts
Omaha, NE 68175

Fax To: 1-402-351-5779
Questions (MGAs Only): 1-800-867-6873

Email To: contractsandappointments@mutualofomaha.com