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In order to properly set up your company up in VUE, we need to create a new, Managing Agency Account in eQuote.   The Managing Agency Account will allow Principle Agents to view commission information in the Vue software portal.  The Managing Agency Account will also be used to upload Principle Agent documentation.   Commission Electronic Fund Transfers (EFT) will also be sent to the banking information contained in the Managing Agency Account.  Please note, in order to keep commission information confidential, you may want to also have another eQuote account in your name that can be used by yourself and others for quoting purposes, but would not have access to commission information. **Return the form to brokeronboarding@hometownhealth.com**

**Managing Agency Information**

Please provide the information below as it appears on your W-9.

|  |
| --- |
| Agency Name: |
| Principle Agent Name: |
| Principle Agent Email Address: |
| Principle Agents SSN# |
| Principle Agent License # |
| NPN # |
| Corporate NPN# |
| EIN/Tax ID  or SSN #: |
| Address Line 1: |
| Address Line 2: |
| City, ST: |
| Zip Code: |
| Primary Phone #: |
| Fax # |
| Website: |
| 1. Do you work with an assistant/Account manager? Yes No |
| If yes, please type their name below |
| Type Here |