

Med Supp and Dental Insurance Cross-Sell

Sell More. Earn More.

Receive a cash bonus when you sell our Medicare supplement and Dental insurance products together in the states below from July 1 through Sept. 30, 2024.

- Alabama
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- Florida
- Georgia
- Illinois
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Michigan
- Minnesota
- Mississippi
- Missouri
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Pennsylvania
- South Dakota
- Tennessee
- Texas
- Utah
- Virginia
- West Virginia
- Wyoming

Plus | Idaho, Indiana, Montana, Oregon, South Carolina and Wisconsin. See details on page 2.

Eligibility

You're eligible to earn a cash payout on Medicare supplement and Dental insurance business you place together as a producer (personal production only; individuals or agencies may not qualify based on business placed by down-line producers) for policies underwritten by Mutual of Omaha or its affiliates. Some exclusions apply.

Qualifying Business

Med supp and Dental insurance policies sold together can be:

- Med supp Plans F, G, and N in states listed above
- Mutual Dental PreferredSM and Mutual Dental ProtectionSM insurance plans sold in eligible bonus states
- Underwritten and open enrollment

Payment

The cross-sell bonus pays when Med supp and Dental insurance are sold together to the same customer.

- \$100** when a dental insurance policy is issued with an underwritten Med supp policy (includes internal and affiliate conversions, except in North Carolina)
- \$25** when a dental insurance policy is issued with an open enrollment Med supp policy (excludes internal and affiliate conversions)

Please note:

- Excludes all guaranteed issue and under-age-65 Med supp business
- Med supp and Dental insurance policies must be in force at time payment occurs
- Payment is based on the month in which the policy is effective. Policy effective date means the date in which the policy is in force
- The eligible Dental application must be signed on or after the Med supp application sign date and within 30 days after the Med supp issue date
- Both the Med supp and Dental policies must be issued within the program period (July 1 – Sept. 30, 2024) to be eligible for payment

Payment example:

Med Supp Policy Effective Date	Payment Period
July 2024	Early September 2024
August 2024	Early October 2024



Broker Bonus for Idaho, Indiana, Montana, Oregon, South Carolina and Wisconsin

Timeframe, eligibility, qualifying business and payment schedule are the same as previously mentioned.

Payment

The cross-sell bonus pays when Med supp and Dental insurance are sold together to the same customer.

- **\$30** when a dental insurance policy is issued with an underwritten or open enrollment Med supp policy
- For Med supp plans F, G and N (NM39 in Wisconsin)
- For Med supp plans A, C, F, G, N and high deductible G (in Montana only)
- Mutual Dental PreferredSM and Mutual Dental ProtectionSM insurance plans

Please note:

- Policies must be in force at time payment occurs
- Payment is based on the month in which the policy took effect

Miscellaneous

- Mutual of Omaha reserves the right to change, limit or cancel any promotion, rule or award at any time and for any reason
- You must be currently contracted and actively representing Mutual of Omaha Insurance Company or its affiliates at the time of the award and in good standing
- No substitution for, or transfer of the award will be allowed
- The costs of the award will be reported to you as taxable income on IRS Form 1099
- Special agents' cash awards are allocated to their agency
- This promotion is void where prohibited by law

Why Partner with Mutual of Omaha?

You'll enjoy:

- Household discount to further lower rates (percent and availability vary by state)
- No policy fees
- Plan N as a good option for those who are used to cost-sharing plans, such as employers' health insurance or Medicare Advantage
- e-App storefront for error-free and one signature for two applications
- Talking directly with your underwriter
- Marketing credits to build your business (earned with a minimum of seven issued apps per month)
- Enhanced automated underwriting for Med supp e-Apps (most applications auto-decision within 2 minutes)

Your clients can receive a 15% discount on dental insurance by applying for a Mutual of Omaha dental insurance policy at the same time as a Mutual of Omaha or affiliate Med supp policy when:

- The dental application is signed on or after the Med supp application sign date, and
- Within 30 days after the Med supp issue date