

## 2023 Kaiser Permanente Level Funded Implementation Bonus

Kaiser Permanente is pleased to announce the following Implementation Bonus for our Level Funded program, for all **NEW** groups with effective dates between 5/1/2023 and 12/1/2023. “Level Funded” refers to the program under which Kaiser Permanent Insurance Company administers small employer self-funded health benefit plans.

### Bonus Guidelines for Kaiser Permanente Level Funded Program

<b>NEW</b> to Kaiser Permanente Groups (Not enrolled in a Kaiser Permanente group product in the last 364 days). Group size, 20-49 ENROLLED Subscriber/Employees	\$3,000 per group	Capped at 5 groups
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<b>NEW</b> to Kaiser Permanente Groups (Not enrolled in a Kaiser Permanente group product in the last 364 days). Group size, 50-100 ENROLLED Subscriber/Employees	\$7,500 per group	Capped at 5 groups
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Thank you,

The Kaiser Permanente Sales Teams

#### Terms and conditions:

- Requests for quotes require Broker of Record confirmation or Release of Information Authorization from the group (company letterhead, with authorizing signature)
- Bonus pays on active enrolled subscribers only and is contingent on the group administrative fees being paid in full.
- The Level Funded Implementation Bonus is in addition to other bonus plans offered to the agency.
- Earned bonuses will be paid In February 2024, for 5/1/2023 through 12/1/2023 effective date groups. A final ‘true up’ of subscribers and earned bonus will be conducted 60 days after the end of the program.
- Subscribers must be actively enrolled within 60 days of the effective date for the new group. Subscriber counts for calculation purposes will be determined based on the month following original effective date for the final payment. Groups cannot have been actively enrolled with a Kaiser Permanente fully insured plan in the last 364 days. Groups must be active at the end of the bonus period. Groups terminating during the bonus period will be subtracted from your net total sales calculation and may result in recoupment of paid bonuses.
- Bonuses will be reported and disclosed in accordance with Kaiser Permanente policy and applicable law. Kaiser Permanente will only pay compensation to agencies who are appropriately licensed and appointed in the jurisdiction in which the group is located. Brokers who fail to meet the provisions of the Kaiser Permanente broker/agent agreement are not eligible for payment. Bonuses cannot be combined, split, or assigned across agencies in any manner, including through merger, acquisition, or assignment.
- Kaiser Permanente and/or its designated representatives retain sole discretion over the interpretation of the terms and conditions of, and any or all provisions in, this compensation plan, and over resolution of any disputes from this compensation plan. Kaiser Permanente reserves the right to modify, amend or terminate this offer at any time, at its sole discretion.
- All compensation disclosure requirements are the sole responsibility of the Broker. This document serves as the basis for your compensation calculations and disclosure.