

CONTRACTING DOWNSTREAM SYMETRA APPOINTMENTS

Requirements

Please return the completed form by fax at 1-866-817-9751 or email contracting@symetra.com

If you need assistance, please contact us by phone at 1-800-210-1106 Option 1, or email contracting@symetra.com.

A. Corporation Agency

Contracted direct with Symetra. Symetra pays commissions to the contracted entity. Agency must have an active insurance license and a tax-id number. Please ensure that all California producers receive a physical copy of Symetra's obligations under the California Consumer Privacy Act of 2018 and the California Privacy Rights Act of 2020 prior completing the items listed below (SYM-1273).

Complete and sign the following items:

1. Appointment application signed by an agency principal (SAS-1014)
 2. W9
 3. Sales Agreement Acknowledgment & Acceptance Agreement
 4. Copy of E&O coverage (\$1M Minimum)
 5. Transmittal Form
-

B. Licensed Only Producer/Solicitor/Individual Producer

Producer is appointed under a Corporation/Agency. Symetra pays commissions to the contracted entity. Producer must have an active insurance license. Please ensure that all California producers receive a physical copy of Symetra's obligations under the California Consumer Privacy Act of 2018 and the California Privacy Rights Act of 2020 prior completing the items listed below (SYM-1273).

Complete and sign the following items:

1. Producer completes and signs producer appointment application (SAS-1012)
 2. Proof of Anti-Money Laundering (AML) training, (Required for non FINRA registered agents).
 3. Transmittal Form
-

C. Sole Proprietor/Individually Contracted Producer

Contracted direct with Symetra. Symetra pays commissions to the contracted producer. Producer must have an active insurance license. Please ensure that all California producers receive a physical copy of Symetra's obligations under the California Consumer Privacy Act of 2018 and the California Privacy Rights Act of 2020 prior completing the items listed below (SYM-1273).

Complete and sign the following items:

1. Appointment application (SAS-1013)
 2. W9
 3. Sales Agreement Acknowledgment & Acceptance Agreement
 4. Copy of E&O coverage (\$1M Minimum)
 5. Proof of Anti-Money Laundering (AML) training, (Required for non FINRA registered agents).
 6. Transmittal Form
-

D Institutional Producer (BGA/IMO Use ONLY)

Producer is appointed under a Bank/Broker Dealer. Symetra pays commissions to the Bank/Broker Dealer and the override is paid to the BGA/IMO. Producer must have an active insurance license. Please ensure that all California producers receive a physical copy of Symetra's obligations under the California Consumer Privacy Act of 2018 and the California Privacy Rights Act of 2020 prior completing the items listed below (SYM-1273).

Complete and sign the following items:

1. Agent completes and signs Institutional LOA producer appointment application (SAS-1018)
 2. Proof of Anti-Money Laundering (AML) training, (Required for non FINRA registered agents).
 3. Institutional Transmittal Form
-

E. Items not required

Copies of insurance licenses. Licenses are verified electronically.
