



TO: ALL BROKERS

SUBJECT: Appointment with Infinity Trust

Please check and return items below prior to or concurrent with submission of your first case with Infinity Trust.

- _____ IRS Form W-9
- _____ Copy of Insurance License
- _____ Signed Commission Contracts (2)
- _____ Copy of Declarations Page for Errors & Omissions Coverage
- _____ Business Associate Agreement (2)

The IRS Form W-9 should be completed in the name of the entity to whom commission is to be paid. The Commission Contract and Business Associate Agreement, if applicable, must be signed by a principal of the agency if commission is payable to the agency.

Please provide a copy of the insurance license for any agent / broker marketing the Infinity Trust Products AND the agency insurance license, if applicable. Additionally, please provide a copy of the Declarations page of the E & O policy for the agency and indicate if producers for the agency are covered under the agency contract. If not, please provide a copy of the agent / broker's individual E & O Declarations page.

Please note that commission checks will be issued only for amounts greater than \$50.00. However, checks will not be released until all appointment materials have been received in our office.

Should you have any questions, please contact me.

Very truly yours,

Lisa R. Yanak

Lisa R. Yanak
Trustor