

Product & Service Notice



Date: Feb. 12, 2021
To: Ameritas Field Associates
RE: UPDATED: JIT Appointments and
Payment for non-resident appointment
renewal cost

Form Number: PS 4261
Product Area: Individual

Summary: We are making changes to help streamline the licensing/onboarding process to be faster and more efficient. Therefore, Ameritas now will pay for non-resident appointment fees to cover Just-In-Time (JIT) appointments for new policy applications as well as non-resident appointment renewal fees based on previous production.

Additional Information:

- **Effective Oct. 1, 2020**, when you send in a new application and you are not appointed in that state, Ameritas will pay your appointment fee by introducing Just-in-Time for non-resident appointments. However, because the state of Pennsylvania is a pre-appointment state, please be sure to request the appointment to be processed prior to sending in an application.

This will reduce between three to seven days of waiting for the fee to be paid by the field associate. Field associates still need to ensure their states' licenses are in good order to be appointed at the appropriate time. **Note:** If field associates have an incorrect license class or line of authority for a certain state, this will prevent the appointment.

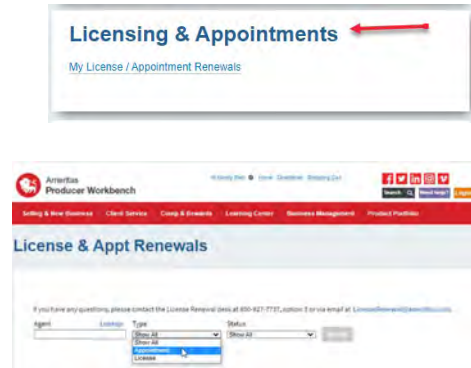
Additionally, the "appointment fee" link on Producer Workbench and Ameritas.com will no longer be available.

- **Effective Nov. 1, 2020**, every month the licensing renewal team will review a monthly report showing appointments that are up for renewals. The report will only consist of the states that are up for renewal for that month as state renewals come up during different times in the year. If a field associate on that report has submitted business or has received first-year compensation in that state in the past 12 months, Ameritas will pay the renewal fee and renew the appointment. This will allow for faster turnaround times and a better field associate experience.

Note: If the field associate has not submitted business or has not received compensation in the last 12 months, his/her appointment in that state will be automatically terminated. When your next application in that state comes in, we will re-appoint you through a Just-In-Time appointment and

pay the non-resident fee. If it's a state that Ameritas requires the upline to be licensed and appointed in order to receive compensation, we will automatically renew the appointment.

Additionally, you will no longer see the Licensing & Appointments tile on Producer Workbench. The option for appointment renewals will be removed from the License & Appt Renewals page.



For questions, contact the licensing at 800-388-8802, Ext. 52059.

The archive of Ameritas Product & Service Notices can be found on Producer Workbench > Product Portfolio.

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