

APPASSIST APPOINTMENTS

Here's a quick-reference list of what we'll need to get an agency, broker, financial institution or financial institution employee appointed at Banner or William Penn.

New Agent/Broker, Brokerage Development GA, etc....

- Adoption Agreement (AB30 for Banner; 2976 for Penn)
- Biographical Form (BK10 or BK10WP) – Please indicate both commission schedules on the second page (Example AB80 / PB73 unless using the non-commission agreement)
- State License(s)
- W-9
- Agency Commission Payment Profile (BK12 or BK12WP) optional
- Assignment of Commission (BK6 or BK6WP) optional

Financial Institution Agency Agreement

- Agency Agreement (IGA or IGAWP)
- Biographical Form (BK10 or BK10WP)
- Financial Institutions Registered Representative Appointment Application (BK23 or BK23WP)
- Agent for Application signatures if different from the one executing the agreement.
- W-9
- State License(s)
- Agency Commission Payment Profile (BK12 or BK12WP) optional

Financial Institution Employee

- Financial Institutions Registered Representative Appointment Application (BK23 or BK23WP)
- State License(s)

Banner Licensing Department

E-mail: agentlicensing@bannerlife.com
Telephone: 800.638.8428, x4163
Fax: 301.297.6960

William Penn Licensing Department

E-mail: wpagentlicensing@LGAmerica.com
Telephone: 800.346.4773, press 1 and then 4
Fax: 516.229.3013

Banner Life Insurance Company, Urbana, MD, is licensed to do business in 49 states and the District of Columbia. Life insurance issued in New York is underwritten by William Penn Life Insurance Company of NY, Garden City, NY. Banner is not licensed in New York state and does not solicit business there. LAA1690 (09.12) 12-342

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