



## Commission/Fee Split Worksheet

This document is designed to validate the commission split between multiple agents and advisers. Commission splits are only allowed when each advisor is properly licensed and registered to do so. This worksheet must be included as a cover sheet with all new business to be split.

### Commission Split Reference

**20% - MARKETING**

Hosting seminars, sorting the database, bringing the client to an educational meeting, and quoting fees.

**20% - DATA COLLECTION**

Having clients sign documents for us to collect data, share information, and produce deliverables.

**20% - CASE DESIGN**

Facilitating underwriting, developing insurance ledgers, integrating proposed insurance numbers into a tactical or comprehensive plan

**20% - IMPLEMENTATION**

Signing applications, delivering the policy, collecting payment

**20% - SERVICE**

Providing regular statements, updating plans illustrating tax impact of insurance and investments on the balance sheet and income statement, meeting with the client to discuss maintaining or enhancing services.

Client Name \_\_\_\_\_

**Primary Advisor (SERVICING)**

Print Name \_\_\_\_\_ % \_\_\_\_\_

Signature \_\_\_\_\_

**Secondary Advisor**

Print Name \_\_\_\_\_ % \_\_\_\_\_

Signature \_\_\_\_\_

\_\_\_\_/\_\_\_\_/\_\_\_\_ Effective date replaces all previously submitted or verbally agreed commission splits.