



# CBIZ / GENWORTH FINANCIAL Fill-Able Contracting/Appointment Forms

## When do I submit CBIZ/GENWORTH Appointment Paperwork?

- Appointment paperwork and new business application can be submitted concurrently except in the states listed below.
- **Note:** Genworth is restricted in **MONTANA** and **PENNSYLVANIA**; agent(s) must be appointed **"PRIOR"** to solicitation of the life insurance application.

## Where do I submit CBIZ/GENWORTH Appointment requirements?

- Please forward all completed forms directly to CBIZ Life Insurance Solutions, Inc.
  - Fax 858.444.3157
  - OR
  - Email: [srlicensing@cbiz.com](mailto:srlicensing@cbiz.com)

## Who should I contact for contracting and/or appointment inquiries?

- Please contact our Producer Services Department

Email: [srlicensing@cbiz.com](mailto:srlicensing@cbiz.com)

Phone: 800.422.7536

Fax: 858.444.3157

Mail: 10616 Scripps Summit Court, Suite 210  
San Diego, CA 92131

## What requirements must be submitted for a CBIZ/GENWORTH Appointment?

- All pages of GENWORTH Producer Appointment Application
  - Producer Appointment Form (9 pages)
  - Producer Agreement
  - EFT Authorization Form [**Mandatory**]
  - Assignment of Commission Form [complete only if applicable]
- Current Resident Life License and/or License in the state of sale.
- Proof of Errors & Omissions

\*\*\* **GENWORTH** – only accepts Anti-Money Laundering (AML) Training completed through LIMRA. AML training site is located @ <https://aml.limra.com>. "User Name" is the first 4 characters of your last name (lower case only) combined with the last 6 digits of your SSN and "Password" is your complete last name (all lower case). Once logged in; online instructions will prompt you to create your own new password. \*\*\*



CBIZ Life Insurance Solutions, Inc

Producer Services Department

10616 Scripps Summit Ct., Suite 210 • San Diego, CA 92131

Phone: 800.422.7536 • Fax: 858.444.3157

Email: [srlicensing@cbiz.com](mailto:srlicensing@cbiz.com)