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

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

- Please contact our Producer Services Department

Email: 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. ***

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