

2023 MA AEP CO-OP

General co-op Rules:

- 1.Receipts dated August 1 to November 30
- 2.Medicare Advantage only focused Ads, mailers etc...
- 3.Agents must be certified for carrier the co-op funds are offered
- 4.The co-op request must be for one of the carriers providing co-op (not UHC)
- 5.Provide a copy of advertisement-print ad, social media, flyer, postcard etc.
- 6.Please include air dates for all radio and TV advertising
- 7.Please explain events—when, where, date (Sales or Educational)
- 8.Custom branded items such as banners & giveaways must be tied to an event

Acceptable uses of co-op Include:

- 1.Mailers – postcards, letters, PTCs, BREs, postage, envelopes
- 2.Internet Leads
- 3.Internet Ads
- 4.Magazine Ads
- 5.Newspaper Ads
- 6.TV Leads
- 7.Signage promos

Unaccepted use of co-op Include:

- 1.Gift certificate receipts will not be accepted
- 2.Office equipment invoices will not be accepted
- 3.Reimbursement for employees hired will not be accepted
- 4.Co-op is not to be used to entice an agent/agency to transfer from another Marketing Partner
- 5.No billboards
- 6.No website buildouts
- 7.No travel related expenses (gas, airfare or hotels)
- 8.No 3rd party consulting fees
- 9.No offshore vendors or dialers

Co-op Request Submission:

- 1.All pre-approved co-op requests are to be sent directly to _____
- 2.Please include a current W9 for the agent/agency requesting the co-op (Oct-2018 version)
- 3.Receipts equaling twice the amount of the approved co-op
 - a.Optional: EFT authorization form if funds are to deposited electronically