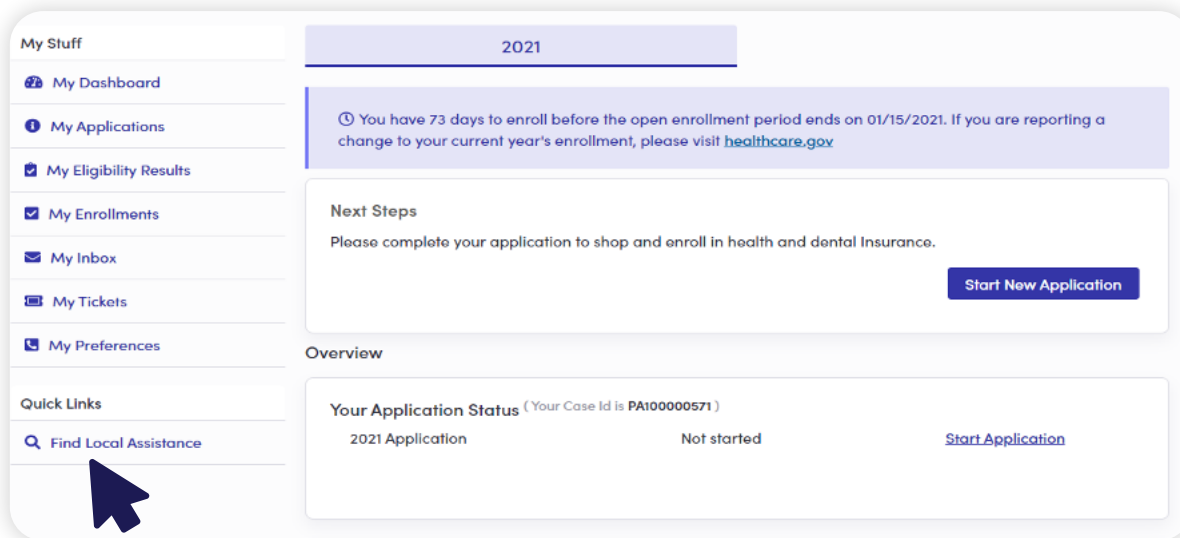


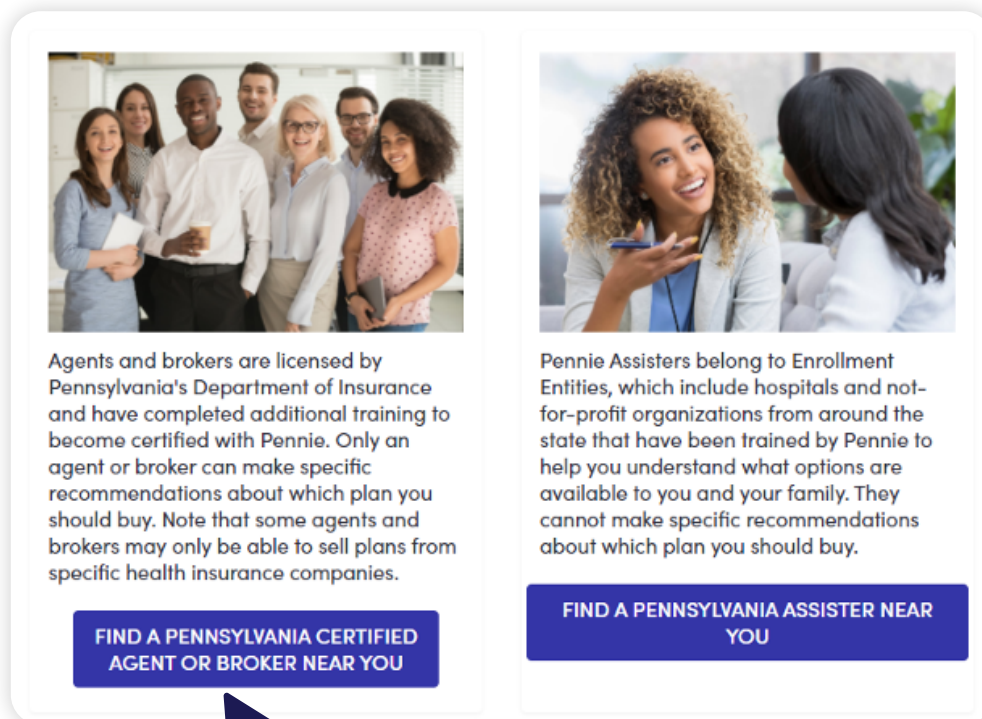
How to designate a Broker/Agent to a Customer

Log into your Pennie account. Your customer dashboard will be displayed.

Click on “Find Local Assistance” under “Quick Links” on the left navigation list in Dashboard.



Click on “FIND A PENNSYLVANIA CERTIFIED AGENT OR BROKER NEAR YOU” under “Find Local Assistance at No Cost to You” pop-up window.




Search for a Certified Agent or Broker and enter the search fields and click on “**Search**” button.

OR

Search by location

Zip code *

Distance

5 

miles

Languages

Select an Option

Search

Search by Name

First Name

Last Name

Agency Name

Search

Example: First Name = Sumathi

Search by Name

First Name

Select the Broker/Agent from the list and click on the broker name.

4 Agents found Sumathi [Search Again](#)

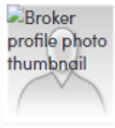
Name	Contact Info	Product Expertise	Languages
sumathi agancymanager	test st 29 brownville, PA 15417 929-620-5581 sumathihsagency@yopmail.com	Health	
Sumathi HS	Sumathi Test Broker 1 N 2nd St Harrisburg, PA 17101 929-620-5581 sumathihs_broker@yopmail.com	Health, Dental, Medicare	English
Sumathi HSBroker	Agent Test Business 1 N 2nd St Harrisburg, PA 17101 929-620-5581 T242sumathihsbroker@yopmail.com	Health, Dental, Vision, Life, Medicare, Workers Compensation, Property/Casualty	English
SumathiABC Test	agenttestinguat1 100 State St Harrisburg, PA 17101 917-328-6976 abc.abc@yopmail.com	Health, Vision, Life, Medicare	English

Click on **"SELECT AGENT"** button on the **"Agent selection"** page.

Agent Selection

Selecting an agent as your representative allows them to access your account, see your information, and make changes on your behalf.


[Back](#) [Search Again](#) [SELECT AGENT](#)



sumathi agency

st 29, brownville, PA 15417
929-620-5581
sumathihsagency@yopmail.com

Product Expertise	Health, Dental, Vision, Life, Medicare, Workers Compensation, Property/Casualty
Languages Spoken	
State License Number	9876543212
Clients Served	Individuals / Families



Brownville
View larger map

Map data ©2020 Terms of Use Report a map error

[+] What should I know before I designate an Agent?

Accept the **'Terms and condition'** and then **sign** and click on **"Confirm"** button.

Agent to be Designated: sumathi agency

☒ I authorize this agent or broker to access, enter, and update information in my online application. I further grant permission to the agent or broker to submit my completed application and Exchange agreement, including signing the application and Exchange agreement on my behalf.

☒ I understand that I can revoke the authorization for this agent or broker at any time through my account dashboard or by calling at 1-844-844-8040 or TTY 711.

☒ I grant permission to the agent or broker to enter payment information on my behalf. I understand that the insurance premium that I am quoted will be charged to my account.

By entering my eSignature below, I am acknowledging the above and affirming the accuracy of the information provided and any assertions made herein, under penalty of perjury, pursuant to 28 U.S.C. § 1749 and 18 Pa.C.S. § 4904.

Signature

Applicant Name **test account**

Applicant E-Signature *

Type your full name here as your electronic signature.

Today's Date

[Confirm](#)

Account is successfully designated to a Broker, click on '**Close**' button.

Please Note: The Broker must accept the customer's request for assistance before they can begin assisting the customer.

Congratulations!

Thank you for requesting to work with sumathi agency. Your request has been submitted to sumathi agency. They will need to accept your request before they can begin assisting you. In the meanwhile, feel free to contact them via phone or email.

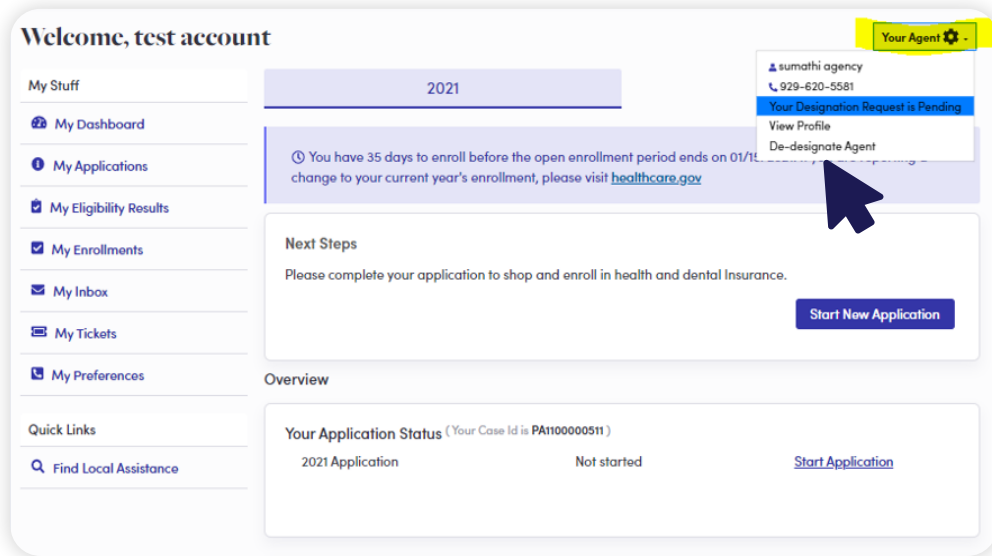
[Back to Search page](#)

[Close](#)

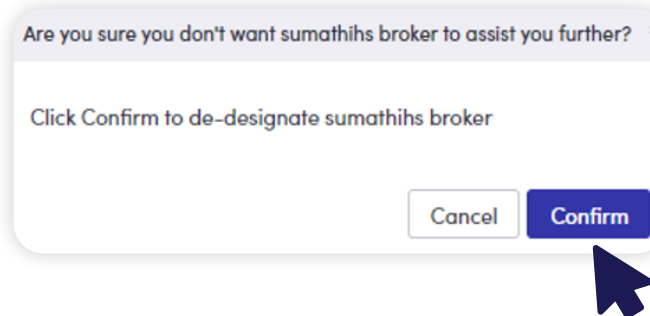


How to Revoke Assister Designation

Log into your Pennie account. The customer dashboard will be displayed. In the top right-hand corner select the “**Your Agent**” option. Then select “**De-designate Agent**”



Pop-up window is displayed as “Are you sure you don’t want Sumathihs Broker to assist you further?” – click on ‘**Confirm**’.



The Agent/Broker is successfully de-designated.

