

How to Make Changes in Agency Sweep Account Agent Center: Licensing



Step 1

| Action | Screen |
|---|--------|
| <p>Within Agent Center, choose the Agency tab and select Licensing maintenance.</p> | |

Step 2 and 3

| Action | Screen |
|--|--------|
| <p>Within the Agency section, select Update agency bank account information.</p> <p>The agency admin will fill out the PowerForm Signer Information and click Begin Signing button.</p> <div data-bbox="130 1633 597 1850" style="border: 1px solid black; padding: 10px; margin-top: 20px;"> <p>! This form is for Premium Sweep accounts only. Any updates for the Compensation bank account (for commissions, etc.) need to be done through the Commission SAP Sales Cloud website.</p> </div> | |

How to Make Changes in Agency Sweep Account

Agent Center: Licensing



Step 4

| Action | Screen |
|---|--------|
| <p>Read the Electronic Record and Signature Disclosure and click “I agree to use electronic records and signatures.”</p> <p>Click Continue.</p> | |

Step 5

| | Screen |
|--|--------|
| <p>On the DocuSign site, complete the Agency Banking Authorization Form fields and be sure to select the Change box.</p> <p>You will need:</p> <ul style="list-style-type: none"> • Name as it appears on the Bank Account • Name of Financial Institution • Bank/Credit Union ABA# • Account Number <p>Copy of a voided check (optional)</p> <p>Electronically sign the application by clicking the Sign button. Attach a voided deposit slip or voided check (optional).</p> <p>Click Finish.</p> | |

How to Make Changes in Agency Sweep Account

Agent Center: Licensing



Step 7 Optional

| Action | Screen | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|-------------------------------|-----------------------------------|-----------------------|-----------|----------|-----------------------------|-------------------|-------------------------------|-----------------------------------|-----------------------|----------------|----------------------|-----------------------------|------------------------------|--|-----------------------|-----------------------|---------------|--|--|-----------------------------|--------------------|--|--|--|
| <p>If updates for Compensation bank accounts need to be done, they must be done through the Commission SAP Sales Cloud website.</p> <p>The link to that site is for Admins only and can be found in Agency>Reports>Commissions and Bonuses. (If you are not an Admin you will not see this in the Agency dropdown.)</p> | <p>The screenshot shows the Nationwide Agency dropdown menu. The 'Agency' option is highlighted with a green box. Below the dropdown, a grid of menu items is shown, with 'Commissions & bonuses' highlighted with a green box.</p> <table border="1"> <thead> <tr> <th>USER & AGENCY MAINTENANCE</th> <th>REPORTS</th> <th>TECHNOLOGY</th> <th>MARKETING</th> <th>PROGRAMS</th> </tr> </thead> <tbody> <tr> <td>Agent Center administration</td> <td>Agency production</td> <td>Commercial comparative raters</td> <td>Nationwide agent brand guidelines</td> <td>Elite partner program</td> </tr> <tr> <td>Agency profile</td> <td>Awards & recognition</td> <td>Personal comparative raters</td> <td>Nationwide marketing central</td> <td></td> </tr> <tr> <td>Licensing maintenance</td> <td>Commissions & bonuses</td> <td>Download info</td> <td></td> <td></td> </tr> <tr> <td>AMS download & registration</td> <td>PL service metrics</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | USER & AGENCY MAINTENANCE | REPORTS | TECHNOLOGY | MARKETING | PROGRAMS | Agent Center administration | Agency production | Commercial comparative raters | Nationwide agent brand guidelines | Elite partner program | Agency profile | Awards & recognition | Personal comparative raters | Nationwide marketing central | | Licensing maintenance | Commissions & bonuses | Download info | | | AMS download & registration | PL service metrics | | | |
| USER & AGENCY MAINTENANCE | REPORTS | TECHNOLOGY | MARKETING | PROGRAMS | | | | | | | | | | | | | | | | | | | | | | |
| Agent Center administration | Agency production | Commercial comparative raters | Nationwide agent brand guidelines | Elite partner program | | | | | | | | | | | | | | | | | | | | | | |
| Agency profile | Awards & recognition | Personal comparative raters | Nationwide marketing central | | | | | | | | | | | | | | | | | | | | | | | |
| Licensing maintenance | Commissions & bonuses | Download info | | | | | | | | | | | | | | | | | | | | | | | | |
| AMS download & registration | PL service metrics | | | | | | | | | | | | | | | | | | | | | | | | | |

By accepting a copy of these materials:

- (1) I agree that I am either: (a) an employee or Contractor working for Nationwide Mutual Insurance Company or one of its affiliates or subsidiaries ("Nationwide"); or (b) an Independent Sales Agent who has a contract and valid appointment with Nationwide; or (c) an employee of or an independent contractor retained by an Independent Sales Agent; or (d) an Independent Adjuster who has a contract with Nationwide; or (e) an employee of or an independent contractor retained by an Independent Adjuster.
- (2) I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide's prior written consent.
- (3) I acknowledge that: (i) certain information contained in this training presentation may be applicable to licensed individuals only and access to this information should not be construed as permission to perform any functions that would require a license; and (ii) I am responsible for acting in accordance with all applicable laws and regulations.
- (4) I agree that I will return or destroy any material provided to me during this training, including any copies of such training material, when or if any of the following circumstances apply: (a) my Independent Sales Agent agreement with Nationwide is cancelled or I no longer hold any appointments with Nationwide; (b) my employment with or contract with a Nationwide Independent Sales Agent is terminated; (c) my Independent Adjuster contract with Nationwide is terminated; (d) my employment with or contract with a Nationwide Independent Adjuster is terminated; or (e) my employment or contract with Nationwide is terminated for any reason.