COMPENSATION & ELIGIBILITY

Waterlily + Wealth Assurance Group

Choose your path.
Know your economics.



Start with eligibility, not a promised split. Are you licensed, appointed and trained for the product, with firm approval and applicable disclosures? Choose your route below; WAG confirms eligibility for each case.

PATH A | Licensed, appointed and firm-approved.
Choose the work you perform. We show your share of the eligible producer commission separately from any agency/BGA compensation earned by WAG; the case summary discloses both.

Illustrative case:
$5,000 eligible producer commission × 40% agreed advisor share = $2,000 to the advisor. The remaining producer pool is allocated as agreed; WAG's agency compensation, if any, is separate. Actual rates and payments depend on carrier, product, case and firm requirements.

Covered by

WSJ · World Economic Forum · yahoo!finance · TechCrunch

Build a plan for free

waterlily.com

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Before work begins, the case summary confirms:

- ☑ Your role and the eligible producer-commission base.
- ☑ First-year and renewal compensation, including separate agency compensation.
- ☑ Who pays whom, when, and under what conditions.
- ☑ Any Waterlily software or service fees.
- ☑ Carrier reversals/clawbacks or changes in case scope.

If the work split changes, we document any resulting compensation change before it takes effect.

PATH B | Not yet eligible—or fee-only.

If you are not licensed or appointed, or your firm does not permit commissions, a firm-approved WAG-led arrangement may support the client without insurance compensation to you. No insurance commission or referral fee is paid where rules prohibit it.

Want eligibility for future cases? We can point you to the required licensing, training, appointments and firm disclosure steps. Compensation applies only after approvals for eligible cases; fee-only advisors can remain on the uncompensated route.

Tell us which path fits and how involved you want to be. We'll confirm eligibility, scope, the producer split and payment terms before you commit.

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