



Attention: 5500 Central Team
3840 Murphy Canyon Road
San Diego, CA 92123

AB 01 003454 90628 H 13 A



SOUTH VALLEY CHARTER SCHOOL DBA CHARTER SCHOOL OF February 7, 2023
BOARD OF DIRECTORS
9530 MONTEREY RD
MORGAN HILL, CA 95037-9356

Re: California Broker Compensation Disclosure Report for SOUTH VALLEY CHARTER SCHOOL DBA CHARTER SCHOOL OF MOR

Reporting Period: 12/2021 - 11/2022

California law requires health plans and insurers to annually disclose broker compensation information to the governing boards of public agency employer groups. Enclosed is your Broker Compensation Disclosure Report. Information reported includes broker compensation related to your public agency's Kaiser Permanente health plan contract and its group policies, if any, with Kaiser Permanente Insurance Company (KPIC). Along with the report, you'll find a Q&A to help answer questions about the law.

This report is considered informational, and you are not required to take any action. You may choose to keep this report as part of your files, but you are not required by the legislation to do so.

California law AB 2589 was enacted in 2008 and went into effect January 1, 2009. The law requires that health plans and insurers annually disclose to the governing boards of public agencies any fees or commissions paid to agents, brokers, or other individuals as part of the group's contract. The report must include the following information:

- The agent, broker, or individual's name and address
- Any amount paid to the agent, broker, or individual (including non-monetary compensation) during your plan's contract year

In addition, the report also provides the following information:

- Total premiums applied by Kaiser Permanente during your plan's contract year
- Member and subscriber counts (as of the last period day of your plan's contract year)

Reporting is required annually, so you can expect to receive the Broker Compensation Disclosure Report for your group each year within approximately 60 days of the end of the contract year. If you have questions about the information, please contact us at **5500-Central-Team@kp.org**.

We value our business relationship with you. Our practices for broker compensation disclosure reporting under AB 2589 reflect our shared commitment to full compliance with the law. Thank you for your continued support.

Sincerely,
Kaiser Permanente
5500-Central-Team@kp.org



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CALIFORNIA BROKER COMPENSATION DISCLOSURE REPORT FOR PUBLIC AGENCIES

Health Plans and Insurance companies are required to provide the following information pursuant to California Insurance Code Section 10604.5 which requires that broker compensation be disclosed to the governing board of any public agency which is covered under a group health insurance policy.

This report is considered informational and you do not need to take any action.

Information Concerning Insurance Coverage, Fees, and Commissions

Region: CA
Name of Insurance Carrier: Kaiser Foundation Health Plan Inc
Plan Sponsor's Name: SOUTH VALLEY CHARTER SCHOOL DBA CHARTER SCHOOL OF MOR

Information Concerning Insurance Contract Coverage

Insurance Carrier: Kaiser Foundation Health Plan Inc
Group Contract or Identification Number: 702399
Approximate number of persons covered at end of policy contract year: 42
Contract Year from 12/2021 - 11/2022
Premium applied by Kaiser Foundation Health Plan Inc during your group's contract year: \$255,006.56

Information Concerning Insurance Contract Fees and Commissions

Total Amount of Commissions Paid: \$16,039.71
Total Amount of Fees Paid: \$0.00

1) Name and address of the agent, broker, or other person to whom commissions or fees were paid:

Expertquote, Inc.
3362 RAINHILL LOOP
ROSEVILLE, CA 95747-9063

Amount of sales and base commissions paid to Expertquote, Inc.: \$16,039.71

Fees and other compensation paid to Expertquote, Inc.: \$0.00

Bonus Amount: \$0.00

Bonus Purpose:

Value of Non-Monetary Compensation: \$0.00

Type/Purpose of Non-Monetary Compensation:

2) Name and address of the agent, broker, or other person to whom commissions or fees were paid:

None

Amount of sales and base commissions paid to None \$0.00

Fees and other compensation paid to None: \$0.00

Bonus Amount: \$0.00

Bonus Purpose: None

Value of Non-Monetary Compensation: \$0.00

Type/Purpose of Non-Monetary Compensation: None

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3) Name and address of the agent, broker, or other person to whom commissions or fees were paid:

None

Amount of sales and base commissions paid to None \$0.00

Fees and other compensation paid to None: \$0.00

Bonus Amount: \$0.00

Bonus Purpose: None

Value of Non-Monetary Compensation: \$0.00

Type/Purpose of Non-Monetary Compensation: None

4) Name and address of the agent, broker, or other person to whom commissions or fees were paid:

None

Amount of sales and base commissions paid to None \$0.00

Fees and other compensation paid to None: \$0.00

Bonus Amount: \$0.00

Bonus Purpose: None

Value of Non-Monetary Compensation: \$0.00

Type/Purpose of Non-Monetary Compensation: None

5) Name and address of the agent, broker, or other person to whom commissions or fees were paid:

None

Amount of sales and base commissions paid to None \$0.00

Fees and other compensation paid to None: \$0.00

Bonus Amount: \$0.00

Bonus Purpose: None

Value of Non-Monetary Compensation: \$0.00

Type/Purpose of Non-Monetary Compensation: None

6) Name and address of the agent, broker, or other person to whom commissions or fees were paid:

None

Amount of sales and base commissions paid to None \$0.00

Fees and other compensation paid to None: \$0.00

Bonus Amount: \$0.00

Bonus Purpose: None

Value of Non-Monetary Compensation: \$0.00

Type/Purpose of Non-Monetary Compensation: None

7) Name and address of the agent, broker, or other person to whom commissions or fees were paid:

None

Amount of sales and base commissions paid to None \$0.00

Fees and other compensation paid to None: \$0.00

Bonus Amount: \$0.00

Bonus Purpose: None

Value of Non-Monetary Compensation: \$0.00

Type/Purpose of Non-Monetary Compensation: None

Date Report Produced: February 7, 2023

