agencyservicebureau
UNIQUE INSURANCE SERVICE INC

Commercial Lines BOR Processing
commercial@asbagent.com

Following are our Broker of Record Procedures for your future reference. Please share with your staff.

A Broker of Record request will not be accepted if any of the following requirements are not met:

- The letter must be addressed to the insurance company (not "To Whom It May Concern") and the letter must be on the Insured's letterhead. If a letterhead is not available, the insured's current address block on the letter can be reviewed for acceptability.
- The letter must contain a list of all commercial policy number(s) (and/or policy types) written with that company. The notation "all policies" is not acceptable as this may be interpreted to include bonds, life insurance or other coverages.
- The letter must include the signature of the individual, partner, or corporate officer authorized to make a change. If the insured is other than an individual, the signer's title is required to be included.
- The letter must specify the effective date of the change. The notation "effective immediately" is not acceptable as this may be interpreted to mean midterm Broker of Record change request. We cannot accept midterm requests.
- The letter must contain the name and address of the new broker of record (our agency information as we have the direct appointment).
- We do not accept mid-term requests.
- Letters must be submitted between 10 and 60 days before renewal.
- Letters are not accepted on accounts in default for premium payments due.
- Countermand period will not be waived by some companies.
- Countermand Letters must also be on the insured's letterhead and follow the same guidelines specified above for the BOR letter.

Sincerely,
Agency Service Bureau
Commercial Lines Team

Additionally, please note:
- ACORD Applications are required. Account information on file is the property of the current agent.
- 4 Years Loss Runs required.
- These guidelines are subject to change without notice.