

Personal Lines BOR Requirements

A Broker of Record request may not be accepted if all the following are not met.

Email BOR requests directly to: brokerchanges@asbagent.com

- A completed BOR form is required. We have different forms for each of our carriers. You will find all our BOR forms on our website: www.asbagent.com/forms.
- The BOR form must be complete and include the insured's signature and mailing address. Please do not replace our agency information with yours.
- If the insured has signed the BOR form electronically, you must include the signature verification page or audit report.
- The BOR submission needs to be sent in a separate email for each insured. Do not submit directly to the carrier. It must be submitted to us for approval.
- Include a copy of the current declaration page for each policy as well as any required state supplemental forms.
- The current policy must meet our office minimum limits: Auto BI/PD: \$100/300/100, Property Liability: \$300,000. UM/UIM can be lower with the signed supplemental.
- Please only submit clean accounts. In addition, homes must show pride of ownership.
- We cannot accept BOR requests for policies that are being non-renewed or if the current agency has lost their appointment. These must be submitted as new business for review.
- We cannot accept any mid-term BOR requests unless the policy can be rewritten & the carrier will allow it. To avoid possible premium increases or the possibility of not receiving commission, we do not recommend processing mid-term.
- Not all carriers will waive the countermanding period.

These requirements/guidelines are subject to change, at any time and without prior notice. If you have any questions, please contact us at 800-232-3622 or by email to brokerchanges@asbagent.com