

Agency Appointment Guidelines

For an agency to be appointed, the following documents are REQUIRED:

- Signed Brokerage Agreement** – All requested information should be completed on the document. The **producer and witness names are required** and should be in signature form. All four pages of the agreement must be returned in one transmission.
- 2) Completed Producer Profile** – the name listed on the profile must match the agreement. If the agency is a sole proprietorship, the legal name needs to be listed on the Producer Profile.
- 3) Current copy of E&O showing limits of at least 1 million aggregate.** If the agency is a corporation, the E&O needs to show that the corporation is covered under the policy.
- 4) Current copy agency/agent license** for the state of residence. If the agency is located in Tennessee, a surplus lines license is required. For Florida agents, both the agent and agency license must be submitted.
- 5) Current W-9 form** – Please complete and sign. Make sure to include legal name and dba, if any. The first line of the form cannot be left blank.

Please also submit any other licenses the agency may hold in any other states. All information should be returned to Agencyappointments@crcins.com.