



Account Reservation Policy

Accounts will be reserved for the first agency who meets the Account Submission Requirements.

The following information is required to reserve an account:

1. Insured name
2. Insured FEIN or SSN
3. Class Code and Payroll Information
4. Insured Location/City
5. Description of Operations

In the event that a submission is received on an account that has previously been submitted, the second agency will need to provide an Agent of Record Letter (AOR), signed by the insured in order to gain access to the submission.