



## **Producer's Responsibility for Records**

As part of the Producer Agreement with our company, all Producers' shall keep true and complete records and accounts of all transactions with policyholders and other parties. The records shall be open at all reasonable times to inspection by representatives of the Company. Please see below guidelines for business conducted on our Izzy system based on transaction types. **Items with an \* (asterisk) always require submission to the company, other items may be retained in your office and will be subject to audit by our company.**

### **New Business (See Fax Cover Page Issued with Application)**

Completed Application with appropriate Signatures including Producer Signature

Applicable Signed Selections or Rejections of coverage

Applicable Signed Exclusion Forms\*

### **Proof of "other coverage" for excluded drivers (if applicable)**

Proof of Applicable Discounts

Transfer Discount\*

Homeowners Discount

Senior Driver or Defensive Driver Discount\* (if available)

Good Student Discount (if available)\*

Driver Training Discount (if available)\*

Anti Theft Devices (if not factory installed)\*

Additional Equipment Coverage Requests with supporting documentation\*

Required Vehicle Inspections\* (requirements vary by state)

Premium Finance Contract\* (if applicable)

Proof of Accident – Not at Fault\*

Proof of Residency\* and Vehicle Registration\* (if applicable)

### **Endorsements and Cancellations**

General notes for requested modifications

Signature authorizing deletion or reduction in coverage

Selection or Rejection Forms if changing coverage

Signature authorizing deletion of a vehicle

Vehicle Inspection if adding physical damage coverage mid term\*

Signature and Written authorization to cancel a policy\*

Broker of Record Change\*

Statements of No Loss for Reinstatement consideration\*

Selection or rejection forms signed by the insured if modifying coverage limits\*