

Compliance Guide

Regulatory requirements

Compliance Overview

As a Daily Event Insurance partner, you play an important role in ensuring our products are sold compliantly. This guide covers key regulatory requirements and best practices.

This guide provides general information. Consult with a licensed professional for specific compliance questions.

Insurance Referral vs. Selling

As a partner, you are referring customers to Daily Event Insurance - you are not selling insurance directly. This distinction is important:

You CAN:

- Describe general coverage benefits
- Share pricing information
- Direct customers to purchase through the widget
- Answer basic questions using approved FAQs

You CANNOT:

- Provide specific coverage advice
- Interpret policy terms and conditions
- Process claims or coverage changes
- Represent yourself as an insurance agent

Required Disclosures

When presenting insurance options, ensure customers understand:

- Insurance is optional and not required for their booking
- Coverage is provided by Daily Event Insurance, not your business
- Full policy terms are available before purchase
- Customers can review and cancel within 24 hours

State-Specific Requirements

Some states have additional requirements for insurance referrals:

State	Requirement
California	Must display insurance license number
New York	Written disclosure of referral relationship
Florida	Cannot receive commission if unlicensed
Texas	Must provide policy summary

Contact compliance@dailyeventinsurance.com for state-specific guidance.

Record Keeping

Maintain records of all insurance referrals for at least 3 years, including:

- Customer name and contact information
- Date of referral/purchase
- Policy number
- Any customer communications

Email compliance@dailyeventinsurance.com or call 1-800-DEI-HELP for compliance questions.