

PRODUCER

Dear Producer,

Season's Greetings and Happy New year.

Please take the time to read the following as some of our procedures are changing in the new year and your assistance and solutions will be needed to help streamline our process and make things easier for staff and producers. Any feedback is always welcome.

You will be sent an AR Report 1st day of the month, which outlines any outstanding premiums for your clients.

If your sheet is blank then good news nothing is due.

Ageing Category 1 or 2 are current items due.

Ageing Category 3 and 4 are on priority as they have reached 60+ days. These require immediate action. The category should be empty.

Kindly review and take the necessary actions to ensure timely payments and avoid any disruptions in coverage.

A few important reminders and guidelines:

Please forward any Client Notes , Emails , or discussions to your CSR by EMAIL so we can keep all records and communications in our system, which is required by the Insurance Council.

If you require a Gold Key Email, please let us know.

AR Reports will be sent to you 1st day of the month.

You can contact CSR for the account for any Invoices or assistance.

New Business premiums must be collected when binding the policy.

Always try to bind with Direct Bill to avoid Credit Card Fees and smoother collection process.

Renewal Premiums must be collected by the Renewal date.

Invoices will be sent to clients generally 30 days before renewal date. Payments are

due on Day 1 of the Policy effective date and reminder will be sent. A Final reminder notice will be sent day 23 after. Policies must be cancelled on renewal date or within 30 days depending on the type. Please check with CSR if needed.

To request any payment arrangements, send to send to your CSR and & for approval. Before agreeing with client.

Payment can be made by cash, cheque, EFT, credit card or E-Transfer :

For 3rd Party Financing for the client ask CSR.

Request CSR add credit card Fee, if payment collected by Agency Bill and credit card, otherwise Producer will be deducted a fee.

If account is still not collected or cancelled after 60 days, 100 % will be deducted from your commissions or an agreed portion each month until cleared.

Any Marketing costs or expenses are the responsibility of the producer. Unless they are common items that we already provide or something that is requested and approved by management.

Any write off or any form of discount will be 100% producer responsibility, any arrangements must be requested and approved by management.

If you require any further assistance with any account please feel free to reach out to or

The report will be scheduled monthly, if you have any questions, please contact us, we are here to help.