

**SAMPLE  
AGENT/BROKER OF RECORD LETTER  
(TO BE SUBMITTED ON GROUP LETTERHEAD ONLY)**

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Date (**IMPORTANT**)

<Name of Broker Program Manager>  
Broker Program Manager  
<Company Name>  
<Company Street Address>  
<Company City, State, Zip>

Dear <Name of Broker Program Manager>:

This is to notify you that our company has appointed (name of agent), whose business address is (street, city, state, zip code) as our sole insurance representative, with respect to coverage provided to this organization by <Insert Company Name> effective (month, date, year). I have authorized (him/her to act on my behalf in place of (former agent/broker name) whose business address is (street, city, state, zip code). **(This sentence only needed if replacing former agent).**

I understand that if our company elects to purchase coverage from your company that <Name of Agent> may be entitled to base and/or bonus compensation for our business.

This designation will remain in effect until we notify <Insert Company Name> in writing to the contrary.

Sincerely,

\_\_\_\_\_  
Signature of Company Officer

\_\_\_\_\_  
Please print (Officer Name)

\_\_\_\_\_  
Title of Company Officer