

SAMPLE AGENT OF RECORD LETTER

Important: Do not use agency letterhead. The letter should be on the client's own stationary.

Personal Lines Accounts

Insured's Name
Insured's Address

(Date)

(Insurer Name)
(Street Address)
(City, State, Zip)

Dear Mr./Mrs./Ms. (Underwriter Name - if known):

RE: (Client Name)
(Policy Type, Policy Number, Policy Term)
(Policy Type, Policy Number, Policy Term)
(Policy Type, Policy Number, Policy Term)

Please be advised that, effective (date), I have appointed (Agency Name, Address) as my exclusive agent and broker for the above noted insurance policies. You are authorized to provide representatives of (Agency Name) with any information they request regarding my insurance contracts, schedules, loss data, rating worksheets, and other miscellaneous items.

The (Agency Name) is not responsible, however, for any errors or omissions that may have occurred in insuring my account prior to the effective date of this agent-of-record assignment. This letter supersedes any previously issued agent-of-record letters.

Sincerely,

(Authorized Representative, Named Insured)