**Broker Appointment Application Form**

**Legal Name of Brokerage –**

**Trading Name –**

**Head Office Address –**

**Phone # –**

**List of Branches *–*** Attach a list if you have more than 5 locations (excel is preferred).



|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name (if different)** | **Address** | **City** | **Province** | **Phone #** |
|   |   |   |   |   |
|   |   |   |   |   |
|   |   |   |   |   |
|   |   |   |   |   |
|   |   |   |   |   |

**Current Contracts**

|  |  |
| --- | --- |
| **List all contracts with Insurance Companies** | **Year Appointed** |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |

|  |  |
| --- | --- |
| **List all MGA’s & Wholesaler’s** | **Annual Premium** |
|   | $  |
|   | $  |
|   | $  |
|   | $  |
|   | $  |

**Points of Contact**– Attach a list if needed (excel is preferred).



|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Area** | **Name** | **Title** | **Email** | **Phone #** |
| Commercial Lines |   |   |   |   |
| Personal Lines |   |   |   |   |
| Overall Contract Relationship |   |   |   |   |
| Add Title Here |   |   |   |   |

**Electronic data transmission Contacts**

|  |  |
| --- | --- |
| **Area** | **Email** |
| Accounting |   |
| Bulletins |   |
| Product Training |   |

Canada’s Anti-Spam Law (CASL) requires consent for our electronic messages. Do you consent to Forward sending emails to your Brokerage? [ ]  Yes [ ]  No

***JET*** is ourself-serve platform where you can quote & issue your documents in real time.

For all brokerage accounts, we require you to provide a \*General email address. This email address will be sent a copy of all policy activity (for all users). This serves as an excellent audit trail for brokerage management. (Consider – *forward@abcbrokerage.com*).

Each individual user’s login will be their company email. Every user can view all brokerage transactions. The platform records activity by individual user.

When a user enters a policy transaction, the individual user will receive the document in their company email and the brokerage will also receive an email in the \*General email address provided below for the Brokerage.

**Platform user logins requested** – Attach a list if you require additional users (excel is preferred). If you have multiple branch locations, we need to know what branch each user should be set up under

|  |  |
| --- | --- |
| **\*REQUIRED** | **General Email for policy deliverance**  |
| \*General email address for policy deliverance |   |

|  |  |  |
| --- | --- | --- |
| **JET Users Name** | **Email** | **Branch City** |
|   |   |   |
|   |   |   |
|   |   |   |
|   |   |   |

**Errors & Omission Coverage**

**Insurer** –       **Policy #** –

**Limit** –       **Expiry Date** – Add Date.

Has there been any E&O claims in the past 5 years? [ ]  **Yes** [ ]  **No**

***If yes****,* please list & explain –

**Corporate Licensing**

|  |  |  |
| --- | --- | --- |
| **Province** | **License #** | **Expiry Date** |
|   |   |  Add Date. |
|   |   |  Add Date. |
|   |   |  Add Date. |

Has the Brokerage had any license(s) suspended, terminated, or been fined? [ ]  Yes [ ]  No

Has the Brokerage or any licensed individual representing the Brokerage been reprimanded by a Regulator in the past 5 years?? [ ]  Yes [ ]  No

*If yes to either question above*, please list & explain –

**Acknowledgement**

I declare that I am authorized to disclose the information in this application and authorized to sign on behalf of the legal entity listed in this application. [ ]  Yes [ ]  No

**Signature** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Print Name** –

**Title** –

**Date** – Add Date.

Once completed, please email the signed application to newbrokerapp@forwardinsurance.ca