

# Producer Preferences



Monitor's goal is to transact business as efficiently as possible with our distribution partners. As a result we have developed options to support a producer's productivity.

The following is a guide to our current Producer Preferences. These will provide you with greater efficiencies and create a hassle-free process. As your needs change, we will continue to develop new preferences that fit those needs and demonstrate our value to you.

## Producer Choices

### Quote Package

- *Auto Renew Policies with Crime Option (Nonprofit only)*  
Allows producers to include a crime option when auto renewing a Nonprofit policy
- *Quote Letter for Retailer* **PL**  
If this preference is set to 'Yes', then an editable quote letter addressed from the wholesale broker to the retail agent is added to the quote package
- *Quote Letter for Insured* **PL**  
If this preference is set to 'Yes', then an editable quote letter addressed from the retail agent to the insured is added to the quote package
- *Commission Rate Printing Option*  
Allows the producer to determine how the commission rate will appear on quotes. Options include 'Do not print', 'Print on cover letter' or 'Print on quote'
- *Simple Quote* **PL**  
Provides an editable version of the quote package with the basic quote details

### Binder Package

- *Cover Page Option*  
A producer is able to request that the cover page is either included or excluded from the binder package
- *Binder Letter for Retail Agent* **PL**  
If this preference is set to 'Yes', then an editable binder letter from the wholesale broker, addressed to the retail agent is added to the binder package
- *Binder Letter for Insured* **PL**  
If this preference is set to 'Yes', then an editable binder letter addressed from the retail agent to the insured is added to the binder package
- *Invoice Option*  
Allows the producer to include or exclude the invoice with the binder package
- *Simple Binder* **PL**  
Provides a simple and editable version of the binder document on generated quotes

### Policy Package

- *Cover Page for Producer Copy*  
The producer can include or exclude the cover page from the producer's copy of the policy package
- *Policy Package Format*  
Electronic policies include the same information as paper policies with the exception of the policy jacket. Producers will receive both an insured version and a producer version as a secured PDF via e-mail.  
  
If a producer prefers receiving paper policies they may request 'Paper Only' status

### MyMonitor Preferences

- *View Files for All Producers*  
Share other producers' submissions within the same office on the MyMonitor Producer Portal



## Producer Preferences (cont)

### Payment Preferences

- *Producer Non-Pay Letter*  
Opt-out of receiving non-pay letters. Producers will not receive a warning before Notice of Cancellation (NOC) is sent to an insured
- *Default Payment*  
Request a default billing option of 'Agency Bill' or 'Direct Bill'
  - *Agency Bill* — 30 days net unless state law dictates otherwise
    - Account current option for qualifying agencies subject to Monitor approval
  - *Direct Bill* — direct bill with up to three installment plans for those accounts that qualify

### Miscellaneous Preferences

- *Application Received E-mail*  
Opt-out of receiving an e-mail when a new business submission is set up with your underwriter and that is not submitted through the MyMonitor Producer Portal
- *Surplus Lines Stamp*  
If this option is set to 'No', it excludes the surplus lines stamp

### Request a Producer Preference

To request a producer preference or change an existing producer preference, submit a request to [agencymanagement@monitorliability.com](mailto:agencymanagement@monitorliability.com) or contact your underwriter. For the latest enhancements and examples, visit [www.monitorliability.com/producerpreferences.html](http://www.monitorliability.com/producerpreferences.html).

Only producers designated as the primary contact at the agency/brokerage can change the quote, binder and policy producer preferences.<sup>1</sup>

### Producer Branding

Producers may add their company logo to preferences denoted by [PL](#)

### ➤ Logo Specifications

If you are requesting a customized quote/binder package, please supply your agency logo to [agencymanagement@monitorliability.com](mailto:agencymanagement@monitorliability.com) that meets one of the following file types:

Format	Resolution	Reason
EPS*	300 dpi	Easiest to Resize
TIF or JPEG	300 dpi	Acceptable

\*Preferred

### About Monitor Liability Managers, LLC

Monitor is an underwriting management company specializing in executive and professional liability insurance. For nearly two decades, we have provided comprehensive insurance at competitive prices. Monitor's consistency of leadership, outstanding customer service and industry expertise enable us to provide insurance products unsurpassed in the marketplace.

Monitor is a member company of the W. R. Berkley Corporation with full underwriting and claims settlement authority for its insurance products.

#### W. R. Berkley Corporation [NYSE: WRB]

- Total assets of \$17.3 billion
- Stockholders' equity of \$3.6 billion
- Annualized revenues of \$4.4 billion  
*(As of December 31, 2009)*

#### A+ Rated Insurance Carriers

- Admiral Insurance Company (Nonadmitted)
- Berkley Insurance Company (Admitted)
- Carolina Casualty Insurance Company (Admitted)
- **A.M. Best Company rated: A + (Superior)**

### For More Information

To request a producer preference or change an existing producer preference, submit a request to [agencymanagement@monitorliability.com](mailto:agencymanagement@monitorliability.com), or contact your underwriter.

<sup>1</sup> Not all producer preferences are available on MyMonitor and may require the producer to contact Monitor at [agencymanagement@monitorliability.com](mailto:agencymanagement@monitorliability.com).