

UNION GENERAL INSURANCE SERVICES, INC.
P.O. BOX 6555, CONCORD, CA 94524
PH: (925)671-2128 FAX: (925)671-0171
LICENSE #0595325

DATE: _____

of pages _____

TO: _____

FROM: _____

SUBJECT: _____

TO PLACE YOUR FIRST PIECE OF BUSINESS WITH US, WE REQUIRE THE FOLLOWING IN HOUSE:

1. Producers Agreement - original
2. Producers Information - original
3. Brokers License - copy
4. Error's & Omissions Policy Dec Page (limit \$1,000,000 or more) - copy
5. Brokers Bond (\$10,000) - copy
6. Completed form W-9 (showing tax ID #) - original
7. Completed Acord application signed and dated by you & applicant--original
8. Diligent Search Report - form SL-2 and Disclosure Notice form D-1 - Originals (if applicable)
9. **AGENCY TRUST CHECK** for down payment - original
10. Please indicate a payment plan:
___ (A) Union General Financed: 25% of base premium + additional insured prem + total tax + total fee.
___ (B) Agent Financed with _____. We require 25% of base premium + add'l. insd. prem. + total tax + total fee.
___ (C) Payment in full.

You may **not** retain commission on your first submission.
Additional insureds are **fully earned** and must be paid in full in the deposit.

THANK YOU