

## Getting Started with the Builders Risk Plan Insured by Zurich

### Registration Instructions

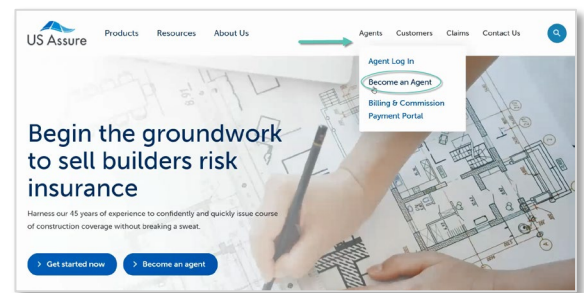
It's fast and simple to access the US Assure Builders Risk Plan insured by Zurich. Follow the steps below to get started today. Our dedicated team of specialists is also available at (800) 800 – 3907, option 5 to assist you.

You will need to provide information on the following items in order to complete registration:

1. Individual license number(s)
2. Federal tax identification (FEIN), business or social security number (SSN)
3. Agency license number(s)
4. Errors & Omissions Policy information

#### Step 1: Begin at usassure.com

Hover over Agents on right of the top navigation menu and then select **Become an Agent** from the drop-down menu.

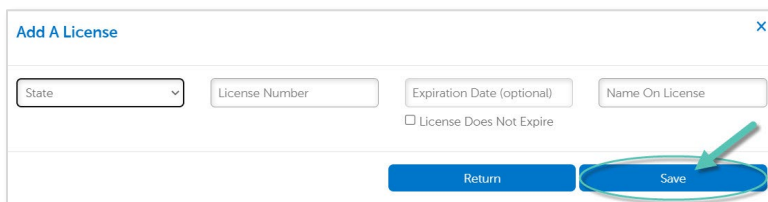
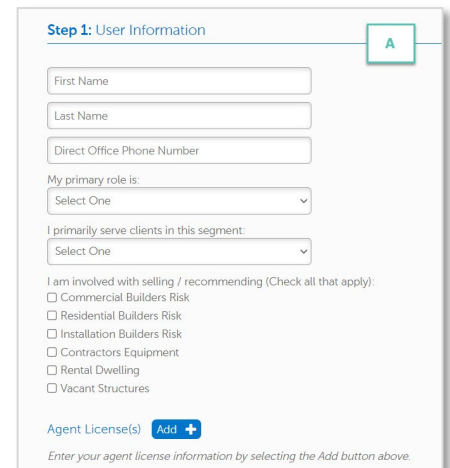


#### Step 2: Complete the Online Form

Answer the questions by providing your contact and other business information to set up your online account and profile.

##### A. User Information

When adding an agent license, you must click **Save** in order to move forward.

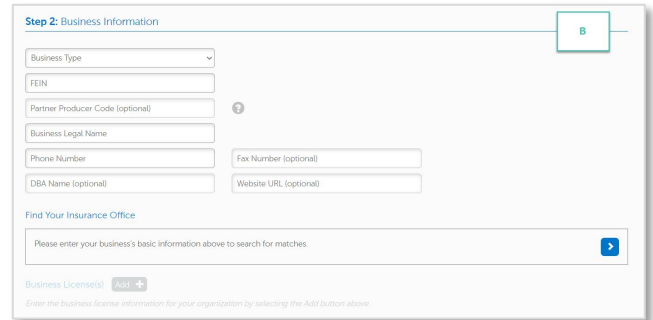



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#### B. Business Information

- Business Type
- FEIN (numbers only)
- Producer Code (Zurich appointed only; skip if not applicable)
- Partner Producer Code (optional; skip if not applicable)
- Business Legal Name (case sensitive)
- Phone Number
- Business License Number (skip if not applicable)
- Physical Address
- Mailing Address
- Billing Address



**Step 2: Business Information**

Business Type (dropdown)

FEIN (text box)

Partner Producer Code (optional) (text box)

Business Legal Name (text box)

Phone Number (text box)

Fax Number (optional) (text box)

DBA Name (optional) (text box)

Website URL (optional) (text box)

**Find Your Insurance Office**

Please enter your business's basic information above to search for matches.

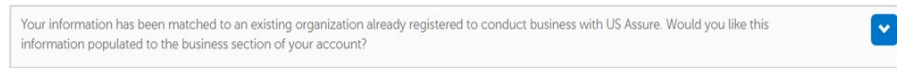
Business License(s) (text box) Add (+)

Enter the business license information for your organization by selecting the Add button above.

#### Is your agency already registered?

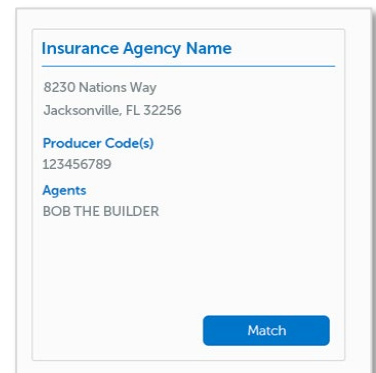
If your office has an existing relationship with us, our system will populate it in the box titled **Find My Insurance Office**. You can then connect to your agency by clicking the Match button.

If the system doesn't automatically populate your existing agency, do not proceed. Instead, call a service representative at **(800) 800 – 3907, option 5** to ensure your registration is completed properly.



Your information has been matched to an existing organization already registered to conduct business with US Assure. Would you like this information populated to the business section of your account?

Match (button)



**Insurance Agency Name**

8230 Nations Way  
Jacksonville, FL 32256

**Producer Code(s)**  
123456789

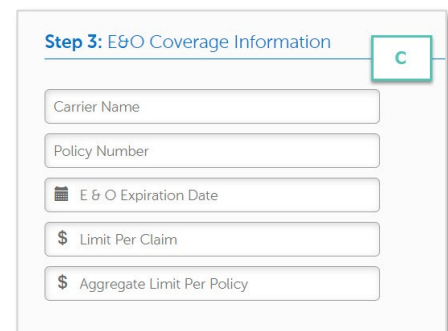
**Agents**  
BOB THE BUILDER

Match (button)

#### C. E&O Coverage Information

This information will be auto-filled when matching to a pre-existing agency in our system. If your agency is new to US Assure, you will need to provide the appropriate policy information.

**Note:** Zurich appointed agents are not required to include this information.



**Step 3: E&O Coverage Information**

Carrier Name (text box)

Policy Number (text box)

E & O Expiration Date (calendar icon, text box)

\$ Limit Per Claim (text box)

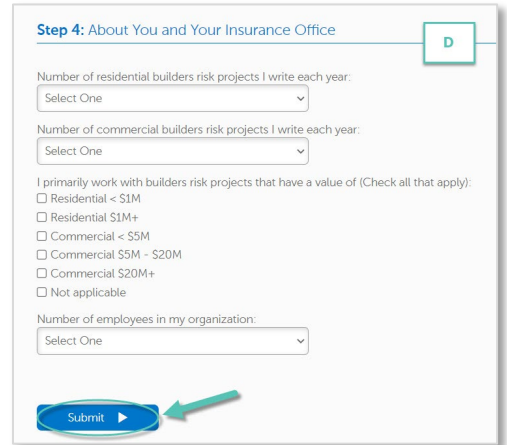
\$ Aggregate Limit Per Policy (text box)

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#### D. About You and Your Insurance Office

Select the appropriate answers about your company and the business you service. When finished, press **Submit**.

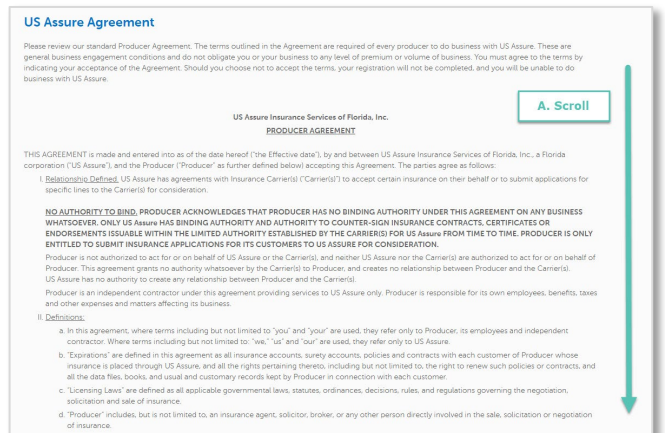
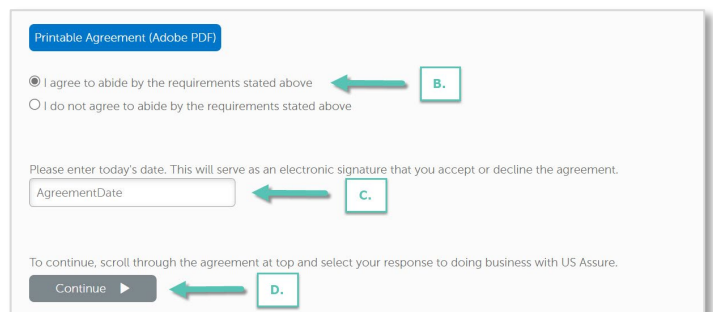


#### Step 3: Accept the User Agreement

Accept the US Assure business agreement by following these steps:

- Scroll down** through the agreement using the bar at the right.
- Select the option next to "I agree to terms of the agreement."
- Select the current date; this will act as your electronic signature.
- Click the **Continue** button.

**Reminder!** There is no premium or volume commitment for you or your organization to do business with US Assure.



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#### Step 4: Create Your Personal Account Information

Establish your secure online user account by creating a password and selecting your personal security question. The system automatically selects a username based on your first and last name, which may be changed.

**Final Step: Create Your Account**

The following information is required to establish your secure online user account.

Username must be less than 20 characters

Username can contain:

- English lowercase letters (a through z)
- Numerical (0 through 9)
- Underscore ( \_ )

Passwords must contain between 7 and 12 characters

Passwords must meet 3 of the 4 conditions:

- English uppercase letters (A through Z)
- English lowercase letters (a through z)
- Numerical (0 through 9)
- Non-alphabetic characters (for example, !, \$, #, %)

Create Account

#### Congratulations! You completed registration.

Within 15 minutes, you will receive an email notifying you that your account set up is complete and ready for you access.

If you're appointed with Zurich, we will review your application and respond promptly.

#### Welcome to US Assure

Your registration is being reviewed. You'll receive a confirmation email at test@test.com with instructions on how to proceed.

In the meantime, check out these popular resources to help you get started with the Builders Risk Plan insured by Zurich.

[> Builders Risk System Demo Video](#)

Get a glimpse of the application process, commonly used features of our platform and tips to guarantee the best experience.

[> Builders Risk Application Checklist](#)

Learn what basic client information you'll need to gather before submitting a builders risk application online.

[> Builders Risk Appetite Guide](#)

Get a list of target accounts, customer types, policy options, underwriting guidelines and more.

Should you have questions, contact our team of dedicated specialists at (800) 800 – 3907 available Monday through Friday, 7:30 a.m. to 7:30 p.m. ET.

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usassure.com | (800) 800 – 3907, option 5