

# 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 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** to move forward.

Add A License			×
State ~	License Number	Expiration Date (optional)	Name On License
		License Does Not Expire	
		Return	Save

First Name		
Last Name		
Direct Office Phone Number		
Ay primary role is:		
Select One	~	
primarily serve clients in this segment		
Select One	~	



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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

### 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?

## 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.

P MARK		
Partner Producer Code (optional)	Θ	
Business Legal Name		
Phone Number	Fax Number (optional)	
DBA Name (optional)	Website URL (optional)	
Find Your Insurance Office Please enter your business's basic informati	on above to search for matches.	
Business Licenselst Act + Draw the business license internation for you		

Step 2: Business Information

Business Type

8230 Nations Way	
Jacksonville, FL 32256	
Producer Code(s)	
123456789	
Agents	
BOB THE BUILDER	
	Match

		-
Ca	rier Name	
Pol	icy Number	
齫	E & O Expiration Date	
\$	Limit Per Claim	
\$	Aggregate Limit Per Policy	

### D. About You and Your Insurance Office

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

Select One   What product is your immediate need?  Select One  Depresentiate your onboarding experience, select one description that best aligns with your level of builders risk insurance knowledge Deprimer: You're in the early stages of learning and seek to build a strong foundation. Intermediate: You're privoluxly issued a few policies but still need to sharpen your hnow-how. Advanced You're assessmed professional who has secured coverage for a variety of construction projects.	Select One What product is your immediate need?	~
What product is your immediate need? Select One To personalize your onboarding experience, select one description that best aligns with your level of builders risk insurance knowledge D Beginner: You're in the early stages of learning and seek to build a strong foundation. O Intermediate: You've previously issued a few policies but still need to sharpen your know-how. Advanced You're a seasond professional who has secured coverage for a variety of construction projects.	What product is your immediate need?	
Select One  To personalize your onboarding experience, select one description that best aligns with your level of builders risk insurance knowledge D Reginner: You're in the early stages of learning and seek to build a strong foundation. Intermediate: You've previously issued a few policies but still need to sharpen your know-how. Advanced You're a seasond professional who has secured coverage for a variety of construction projects.	that product is your infinematic need.	
To personalize your onboarding experience, select one description that best aligns with your level of builders risk insurance knowledge Q Beginner: You're in the early stages of learning and seek to build a strong foundation. D Intermediate: You've previously issued a few policies but still need to sharpen your know how. Advanced You're assecond professional who has secured occurred for a variety of construction projects.	Select One V	
D Beginner: You're in the early stages of learning and seek to build a strong foundation. O Intermediate: You're previously issued a few policies but still need to sharpen your know-how. O Advanced You're assessmed professional who has secured oceverse for a variety of construction projects.	To personalize your onboarding experience, select one description that best aligns with your lew	el of builders risk insurance knowledge
O Intermediate: You've previously issued a few policies but still need to sharpen your know-how. O Advanced: You've a seasoned professional who has secured coverage for a variety of construction projects.	Beginner: You're in the early stages of learning and seek to build a strong foundation.	
Advanced: You're a seasoned professional who has secured coverage for a variety of construction projects.	O Intermediate: You've previously issued a few policies but still need to sharpen your know-how.	
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### Step 3: Accept the User Agreement

Accept the US Assure business agreement by following these steps:

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

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



I do not agree to abide buit	he requirements stated a	have		
r do not agree to ablue by t	ne requirements stateu a	IDOVE		
ase enter today's date. This	will serve as an electron	iic signature that you	accept or decline the	agreement.
greementDate		C.		
	e agreement at top and :	select your response	to doing business with	US Assure.
continue, scroll through th				

### **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.

Username	Username must be less than 20 characters
Password	Username can contain     English lowercase letters (a through z)
Confirm Password	Numerical (0 through 9)     Underscore (_)
Security Guestion	Passwords must contain between 7 and 12 characters
Security Answer	English uppercase letters (a through 2)     English lovercase letters (a through 2)     English lovercase letters (a through 2)     Numerical (0 through 9)     Numerical (0 through 9)

### 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	toU	JS Ass	ure
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ir registration is being reviewed. You'll receive a confirmation email at test@test.com with instructions on how to proceed

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 proceeding of the applicat

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

#### <u>> Builders Risk Application Checklist</u> 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, unde

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.