

CL Help Gatekeeping Process

While you're in the process of building your book, if you come across an account that you believe would be a good fit for this carrier, you can submit it to the clhelp@agentsalliance.biz shared inbox. We'll then review the account and if we agree, we can proceed with the submission, either manually or online, depending on various factors such as fleet size, revenue, payroll, employee count, lines of business, needed by, claims, etc. If we don't think it's a fit, we'll redirect you to other carriers you're appointed with that might be interested in the risk.

Please save this for future reference when submitting.

We cannot consider any account without the below information:

- Named Insured
- Insured Email & Phone (if in AMS360 can put Customer Number)

- Physical & Mailing Address
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- FEIN
- SIC OR NAICS
- Years in Business
- Lines of Business Quoting
- Description of Operations (as detailed as you can be)
 - EXAMPLE: Residential (blow & go) landscape contractor in Dallas TX. NO commercial. 5 Employees/ 4 Trucks/ 2 Trailers. No Sub-work. No drivers younger than 25 & MVRs ran at the time of hire.

- Gross Annual Revenue
- Annual Payroll
- Prior Carrier
- Expiration Date
- Any known losses
- Target Pricing

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Providing this information is enough to decide if we can proceed with their terms. If we do proceed, at that time we will need the full submission to process (accords, supplementals, loss runs, etc.).