

People's Trust has developed a process by which we are able to honor policyholder requests for providing a specific agent or agency the legal right to service or maintain a policy with PTI.

The following guidelines are provided to clarify our Agent of Record change process:

- Agents may submit a request to change the Agent of Record on behalf of a policyholder by completing an AOR 36 or People's Trust Agent of Record Change Request (AOR) form.

Note:

- o The completed AOR should be directed to businesssupport@pti.insure.
 - o All policies are subject to review.
 - o Incomplete forms will be rejected and returned to the submitting agent with an explanation.
 - o At least one named insured listed on the policy must sign the form.
 - o AORs will not be backdated. If an AOR was rejected for being incomplete, the effective date of change will be determined upon receipt of the corrected form.
 - o The submitting agent must be an appointed Agency of People's Trust.
 - o AOR requests will be accepted prior to the renewal effective date, generally no less than 14 days and no more than 60 days prior to renewal. This will allow time for the AOR to be processed and effective on the renewal date.
- AORs will only be accepted effective at the renewal date. AORs are not processed midterm. Any exceptions to this are to be approved by management on a case-by-case basis.



18 People's Trust Way • Deerfield Beach, FL 33441 • businesssupport@pti.insure

New Agency _____

Agent Name _____

Address 1 _____

Address 2 _____

City, ST Zip

Phone

Please be advised that we wish to name _____ Producer Name _____ Code # _____
as our exclusive representative effective _____ Date _____ for the lines of
business shown above, currently in force or submitted by applications.

Insured's Signature _____ Date _____

Insured's Signature _____ Date _____

Company Name _____ Phone of insured _____
(If applicable)

Title (If applicable) _____

Address 1 of insured _____

Address 2 of insured

City, ST Zip of insured _____