



Wholesale Insurance Made Simple

Online Quoting instructions



- 1) Go to <https://simonagency.com/> Click "Zoom Links" button and select UPC
- 2) UPC Login – Enter username and password.
- 3) Start Quote – Enter address.
Note – Under policy workbench, do not type name into primary insured.
- 4) Choose Policy form in policy workbench section.
- 5) Under agent name, click red box to right, click search, click on your underwriter, then click select at top.
- 6) Answer questions in property information.
- 7) Answer questions in primary named insured.
- 8) If you are going to run quote without insurance score, please do not exaggerate client's credit, it will not give you an accurate quote. We suggest running the insurance score or using "average".
- 9) Answer dwelling information questions.
- 10) Calculate replacement costs by clicking "yes", answering questions, then clicking the dollar sign calculate replacement cost on the top right of the section.
- 11) Answer mandatory coverages and enter dwelling amount based off their replacement cost calculation or what you would like it to be.
- 12) Please add additional package coverages, optional coverages, and discounts to your policy. Please also make sure to select how you will be paying for the policy, as there are additional discounts. Under package coverages, we suggest adding the premier plus endorsement.
- 13) Click get rate followed by the next button.
- 14) Please answer underwriting questions followed by the next button.
- 15) Answer additional property questions and insurance score questions, then order insurance score.
- 16) Add interest party if there is a mortgagee or additional insured.
- 17) Order loss history, click get rate again, and click next.
- 18) Enter payment type, if paying by credit card or check, payment must be done before submitting to bind if you aren't using a mortgagee.
- 19) Save and then refer which sends quote to underwriter.

INTERBORO ONLINE QUOTING INSTRUCTIONS

- 1) Go to <https://simonagency.com/> Click "Zoom Links" button and Select Interboro
- 2) Click broker login and enter user ID and password.
- 3) Click quick quote
- 4) Enter location, building, structure information, property attributes, click save and continue.
- 5) Enter the coverage A deductible, as well as the personal liability and medical payment information then click quote.
- 6) Click on the worksheet link where premium has appeared.
- 7) Select the payment plan.
- 8) Print application and send in with signed acord or save and convert to application and fill out the Interboro app which turns into an acord.
- 9) Fill out insured's information, employer information, mailing address, billing address, billing details, then click save and continue.
- 10) Click view property. Fill out property section questions (occupancy details, property attributes etc...). Make sure to fill out all questions with red asterisks.
- 11) Click view coverages.
- 12) After selecting coverages, click save and continue.
- 13) Fill out section on losses, if any.
- 14) At end of quote, print application, do not refer to producer.
- 15) Print out application which comes in accord form, have applicant sign, and then send to designated underwriter for approval and binding.



OTSEGO ONLINE QUOTING INSTRUCTIONS

- 1) Go to <https://simonagency.com/> Click "Zoom Links" button in the upper right, click Otsego
- 2) Click new quote at top.
- 3) Enter primary information, location to Insure, property information, replacement costs, coverages, then click get rate.
- 4) Select your form.
- 5) Select payment plan, we suggest selecting EFT if client is not paying in full.
- 6) Enter client info. and employment info. then click next.
- 7) Fill out the address information, underwriting questions, loss prevention, pets, and other info. sections.
- 8) Fill out prior insurance section.
- 9) Fill out mortgagee information.
- 10) Upload any documents.
- 11) Save quote, then click print at top, and select acord homeowners to be signed and sent to underwriter.
- 12) Click bind when ready.



KENSINGTON ONLINE QUOTING INSTRUCTIONS

- 1) Go to <https://simonagency.com/> Click "Zoom Links" button in the upper right , select Kensington
- 2) Enter Agent ID and password.
- 3) Click homeowner under “select a line” to quote and select the form.
- 4) Fill out the applicant information, and policy date (enter your own email address for agents email address). Click next.
- 5) Enter rate information and line coverages. Followed by any endorsements the applicant may want to add. To do so, use dropdown, select endorsement then click add, followed by desired limit, then click add again.
- 6) Click calculate rate.
- 7) Print out quote, sign it, then send with a signed acord to personal lines underwriter.



Hiscox Online Quoting Instructions

- 1) Go to <https://simonagency.com/> Click "Zoom Links" button and select Hiscox
- 2) Enter your name for first and last name
- 3) Enter your agency name where it says Agency name
- 4) Where it says "Agent ID", enter your email address
- 5) Re-enter email and enter your phone number
- 6) Enter business name, State, and Profession type.
- 7) Select Professional Liability
- 8) Enter information about customer and business address
- 9) Answer questions about your locations, business ownership structure, whether you have a current policy, and a new policy start date
- 10) Answer questions about business services
- 11) Enter the projected revenue
- 12) Click continue to receive quote
- 13) Click continue to application summary
- 14) Check off that you agree with application summary, then click next to get to payment details.



Associated Mutual Quoting Instructions

- 1) Go to <https://simonagency.com/> Click "Zoom Links" button and select Associated Mutual
- 2) Enter login code and user ID
- 3) Enter password
- 4) Click on New Quote
- 5) Fill out primary info and Location to Insure Info on first page, then verify address to confirm distance from water.
- 6) Fill out property information, click credits, select replacement costs and coverages.
- 7) Click on Get Rate then select your form and click next step.
- 8) Enter client info and Employment info, then next step.
- 9) Fill out address information, underwriting questions, swelling questions and renovation questions. Any other info can be checked off here as well. After answering questions, click next step.
- 10) Answer prior insurance information, if any, then click next step.
- 11) Enter mortgagee information, if any, then click next step.
- 12) Attach any documents you have, if any, then click save quote.
- 13) Click print at top of screen and select print Acord 80. Print the document, sign it, and submit to underwriting for binding.



STILLWATER QUOTING INSTRUCTIONS

- 1) Go to www.simonagency.com
- 2) Click "Zoom Links" & select Stillwater insurance
- 3) <http://stillwaterinsurance.com> - Then enter login information
- 4) Go to Agent Login, and select new customer
- 5) Enter zip code to see if you are in an eligible geographic region, then select type of policy form.
- 6) Fill out answers on the policy type section that is brought up first, then click next.
- 7) Enter address information, then click verify address/next.
- 8) Enter personal information of insured, then click next.
- 9) Fill out all questions for residence information, then click next.
- 10) Fill out optional discounts questions, then click next.
- 11) Edit Included coverages to the like of the insured, then click next.
- 12) Answer additional yes or no questions, then click next.
- 13) If insured wishes to add a mortgagee, click add, otherwise click next to continue.
- 14) Enter email address and phone number for supplemental information, then click next.
- 15) Click save at bottom to save all information. Then click continue to buy at bottom in order to purchase policy, or click the application tab and print application to have signed and sent to an underwriter for binding.



Utica First Quoting Instructions

Note Utica First will only run in Internet Explorer

*Go to www.simonagency.com

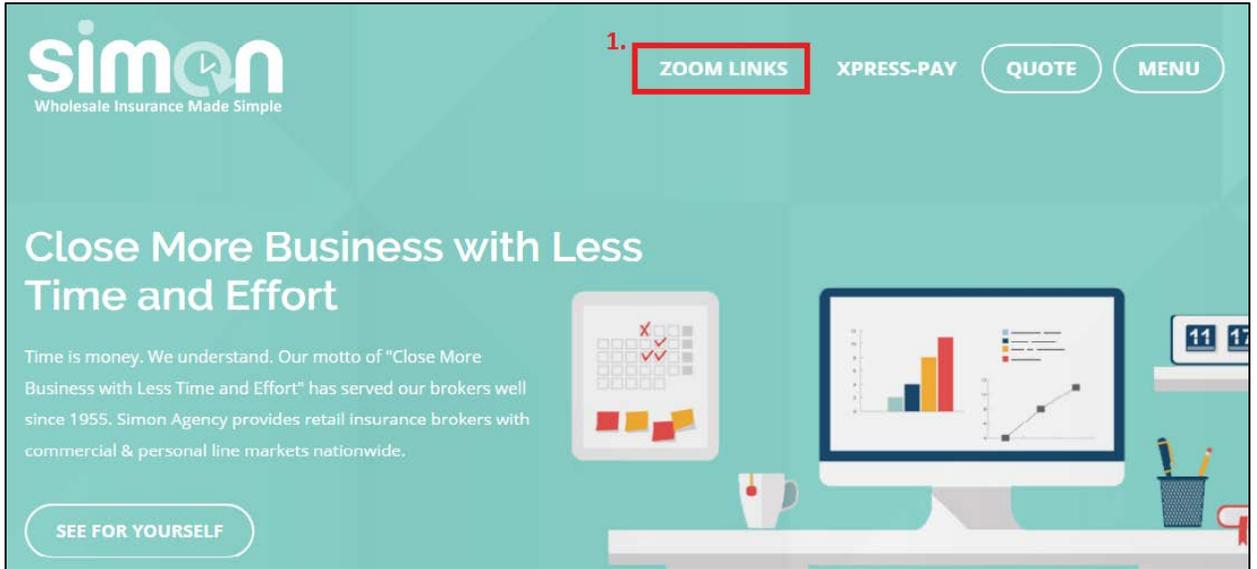
*

- 1) Select "ZOOM LINKS" in the upper right hand corner.
- 2) Select Utica First.
- 3) Select create new quote on left hand side.
- 4) Enter applicant information, click red arrow on bottom right to continue
- 5) Enter policy information, location information then click arrow on bottom right.
- 6) Fill out coverage and extended coverage areas then click red arrow on bottom right.
- 7) Click "rate", then quote will appear.
- 8) Click "view application", then apply necessary signatures to application and send to underwriter for binding.



Wholesale Insurance Made Simple
EMPLOYERS ONLINE QUOTING INSTRUCTIONS

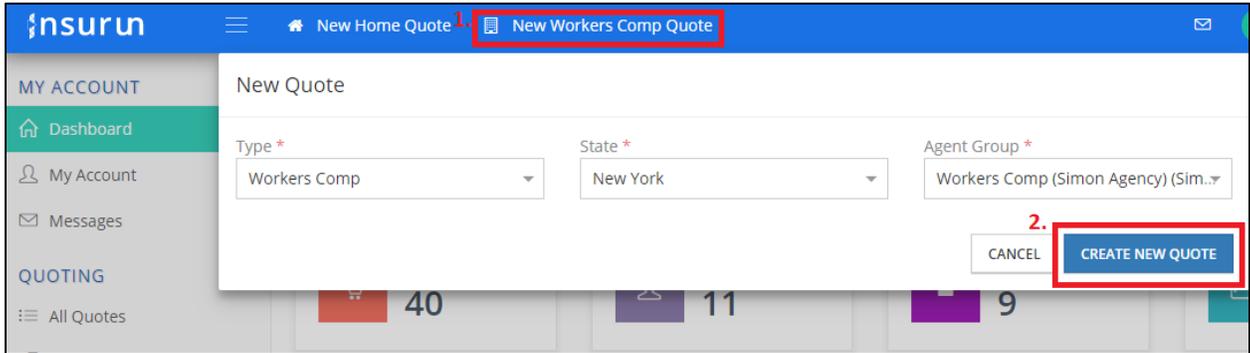
- 1) www.simonagency.com click "Zoom Links" in top right.
- Must be on Google Chrome



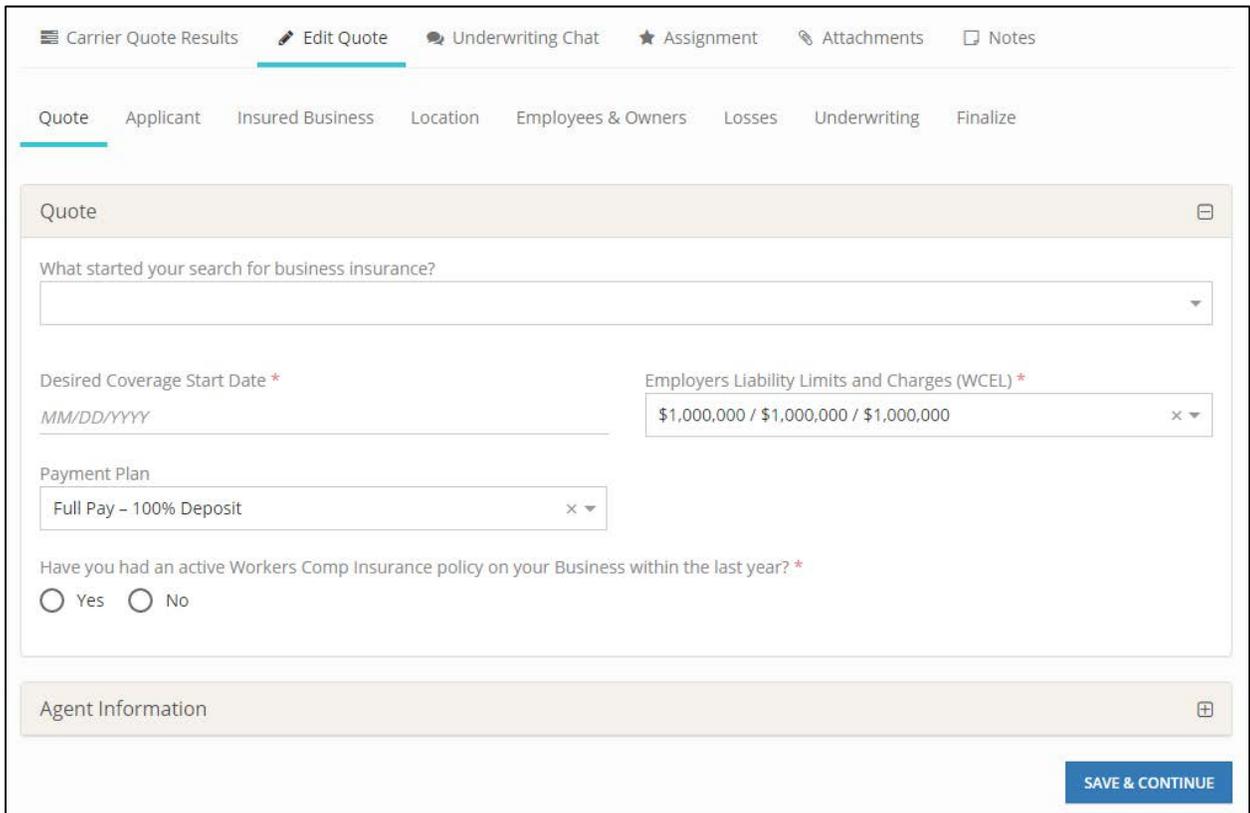
- 2) Select Employers



3) Click New Workers Comp Quote, create new quote.



4) Complete Quote Page,
- \$1 mil / \$1 mil / \$1 mil Ideally
- Full Pay or 30% down unless big premium.
- Click save & continue.



- 5) Applicant Info Section
- Answer all required questions
 - Save & Continue

Carrier Quote Results Edit Quote Underwriting Chat Assignment Attachments Notes

Quote Applicant Insured Business Location Employees & Owners Losses Underwriting Finalize

Applicant

First Name * Middle Name Last Name * Suffix

Street Address Line One * Street Address Line Two

Zip Code * City of Residence * State of Residence *
New York

E-mail Address *
ex. john@example.com Contact Phone
(XXX) XXX-XXXX

Is this your primary business location?
 Yes No

Agent Information

SAVE & CONTINUE

- 6) Insureds Business Section
- Input all necessary & required business info
 - if more than one location make sure to add other location

Carrier Quote Results Edit Quote Underwriting Chat Assignment Attachments Notes

Quote Applicant Insured Business Location Employees & Owners Losses Underwriting Finalize

Insured Business

Legal name of business * DBA Name (Doing Business As)

Describe your business operation (Nature of Business) * Business website

How many years of experience do you have in this industry?

Business Legal Structure * FEIN or SSN (if individual) *

Business Start Date
 MM/DD/YYYY

Agent Information

SAVE & CONTINUE

7) Owner & Employees Section

- Input all required info
- Search for desired class codes
- Drop down Employee Groups and add groups/codes/payrolls as necessary
- Save & Continue

The screenshot shows a web application interface with a navigation bar at the top containing: Quote, Applicant, Insured Business, Location, Employees & Owners (highlighted), Losses, Underwriting, and Finalize. Below the navigation bar, there are two main sections:

- Step 1: Employee Groups**: This section includes a header "Employee Group 1" with a plus icon and a "ADD ANOTHER EMPLOYEE GROUP" button. It contains several input fields: "Class Code", "Job Role", "Location", "Number of Full Time Employees", "Number of Part Time Employees", and "Estimated Annual Compensation".
- Step 2: Owners**: This section includes a header "Owner 1" with a plus icon and a "ADD ANOTHER OWNER" button. It contains several input fields: "Exclude Owner?" (radio buttons for Yes and No, with No selected), "Class Code", "Owner First Name", "Owner Middle Name", "Owner Last Name", "Owner Suffix", "Owner Date of Birth" (with a date format MM/DD/YYYY), "What is your relationship to the business?", "Percentage of Business Ownership", "Estimated Annual Compensation", and "Location".

At the bottom of the form, there is an "Agent Information" section with a plus icon and a "SAVE & CONTINUE" button.

8) Losses

- if no losses please select 'No Losses', if there are losses please make sure to include them!

The screenshot shows a web application interface with a navigation bar at the top containing: Carrier Quote Results, Edit Quote (highlighted), Underwriting Chat, Assignment, Attachments, and Notes. Below the navigation bar, there is a secondary navigation bar with: Quote, Applicant, Insured Business, Location, Employees & Owners, Losses (highlighted), Underwriting, and Finalize.

The main content area contains a question: "Have you experienced any losses in the past 4 years? *". Below the question are two radio buttons: "Yes" and "No" (selected).

At the bottom of the form, there is an "Agent Information" section with a plus icon and a "SAVE & CONTINUE" button.

- 9) Underwriting Questions Section
 - Read & Answer all underwriting questions
 - Agree & run FCRA

Carrier Quote Results Edit Quote Underwriting Chat Assignment Attachments Notes

Quote Applicant Insured Business Location Employees & Owners Losses Underwriting Finalize

Underwriting

Is applicant engaged in any other type of business?

Are sub-contractors used? (if yes, give percentage of work subcontracted)

Any work sublet without certificates of insurance?

Any employees under 16 or over 60 years of age?

- 10) Finalize your quote
 - Validate quote, if quote is good it will go through, if not it will let you know the issues that are present so you can review and correct as necessary

Carrier Quote Results Edit Quote Underwriting Chat Assignment Attachments Notes

Quote Applicant Insured Business Location Employees & Owners Losses Underwriting Finalize

This quote has not yet been validated. Please press the Validate Quote button below to get feedback.

FCRA Authorization

By selecting YES below, you acknowledge our [FCRA Disclosure](#) and [Privacy Policy](#) and you authorize Insurun and its partner carriers to obtain "consumer reports" for the purposes of determining your quotes or application for insurance. This authorization shall remain on file and serve as an ongoing authorization to permit Insurun and its carrier partners to procure consumer reports about the applicant by the applicant or an agent acting on behalf of the applicant.

Do you authorize Insurun and its partner carriers to obtain "consumer reports" on behalf of the customer?
 Yes No

VALIDATE QUOTE

11) Select Desired Carriers & Run Report

1. Carrier Quote Results

EDIT Quote Underwriting Chat Assignment Attachments Notes

SORT BY: RATE (LOW TO HIGH)

3. RUN SELECTED QUOTES

W Employers NY Workers Comp (0001209 Judy as Underwriter) EMPLOYERS

2. [] PREMIUM TOTAL: N/A

Not started

DETAILS

D Direct Carrier Appointment W Wholesale Carrier Appointment

- If excluding officers must print sign and send in officer exclusion form found in details section (see image below for directions to officer exclusion form)

Employers NY Workers Comp

Messages Tech Info 2. Documents 1

Name	Description	File size	Download link
NY Officer Exclusion Form	NY Officer Exclusion Form (C105.51)	40 kB	3. Download

1. DETAILS [3]

D Direct Carrier Appointment W Wholesale Carrier Appointment

12) Binding

- Click Bind Button
- Call in or EFT payment
- If showing the quote has been 'submitted to underwriting' please email Judy Truitt in commercial underwriting at jtruitt@simonagency.com
- If not bindable or declined with Employers go to 'actions' tab in the upper right and click 'generate accord 130' to generate a prefilled accord and email to jtruitt@simonagency.com to be shopped around (see image below for directions to print a prefilled accord 130)

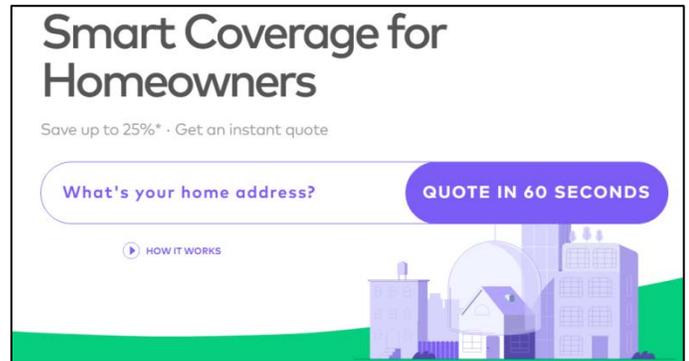
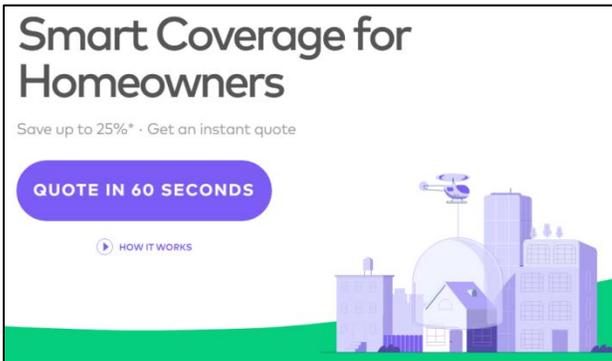
The screenshot displays a quote management interface. At the top left, it shows 'NY WC3J9TB' and a 'READY' status. Below this are three main sections: 'Applicant Details', 'Totals', and 'Internal Details'. A navigation bar at the bottom includes options like 'Carrier Quote Results', 'Edit Quote', 'Underwriting Chat', 'Assignment', 'Attachments', and 'Notes'. A 'SORT BY: RATE (LOW TO HIGH)' dropdown and a 'RUN SELECTED QUOTES' button are also visible. The 'ACTIONS' dropdown menu is open, showing options: 'Email quote to applicant', 'Generate Client Proposal', 'Generate Agent Reference', 'Generate ACORD 130' (highlighted with a red box and labeled '2.'), 'Remove myself as agent', and 'Remove this quote'. The 'ACTIONS' dropdown itself is labeled '1.'



Wholesale Insurance Made Simple

Hippo ONLINE QUOTING INSTRUCTIONS

- 1) www.simonagency.com click 'Zoom Links'
 - Must be using Google Chrome
- 2) Select Hippo
- 3) Log in & input address
 - Click get quote in 60 seconds
 - Input address and begin quote



- 4) Select your desired product

Let's get started!

Is 600 Arcadia Way, Celina a house or condo?



House

This may be a single-family home, townhouse, or duplex you own and live in.



Condo

This is likely a multi-family building or complex in which you own a unit.

5) Home info section

- Confirm generated information is accurate and make changes as needed
- click continue

Home found
Take a look and modify anything if needed.

YEAR BUILT	2017	SQUARE FOOTAGE	2248 sq ft
ROOF TYPE	Asphalt / fiberglass ...	ROOF CONSTRUCTED / REPLACED	2017
FAMILY UNITS	Single family	STORIES	1
SWIMMING POOL	No	CONSTRUCTION TYPE OF HOME	Brick veneer

CONTINUE

6) Build Quality section

- Select "Just the basics", "A few extras", or "Top of the line"

Ok. Now just tell us about your home's fixtures & finishes.
This allows us to estimate rebuilding cost in the event of damage.

Just the basics Example: medium grade flooring, carpeting, or cabinets, and other common details. 50% choose this	A few extras Example: high grade siding or roofing, built-in bookshelves, bay windows, marble/granite counters, above average appliances. 45% choose this	Top of the line Example: marble flooring, crystal chandeliers, commercial or built-in appliances, ornate finishes. 5% choose this
--	--	--

7) Discounts section #1 (Choose all that apply)

- Early bird (Policy effective 8 or more days)
- Recent purchase (new home purchase or owned for less than a year)
- No mortgage (no existing mortgage on property and not seeking one currently)
- Homeowners association (are you a member of a homeowners association?)

Alright, now let's see if you qualify for any discounts.
Choose any that apply.

Early Bird start your policy in 8 or more days for a discount	Recent home purchase You're buying a new home, or have owned your home for less than a year	No mortgage There is no existing mortgage on the property and you are not presently seeking one	Homeowner's association You're a member of a homeowner's association
---	---	---	--

CONTINUE

8) Personal Info

- Input named insured info (spouse and other named insureds can be added later)
- If any valuables you would like added to the policy select yes
- Click "Get Quote"

The screenshot shows a web form titled "Whose name will be on this policy?". On the left is a vertical sidebar with navigation options: "Product Select", "1978" (Home Info), "Build Quality", "Discounts #1", and "1/24/1973" (Personal Info). The main form area has a sub-header "A spouse can be added later". It contains input fields for "FIRST NAME", "MIDDLE", and "LAST NAME", and a "DATE OF BIRTH" field with a "MM/DD/YYYY" placeholder. Below these is a toggle switch for "Any valuables you'd like to add to your policy? (Like your electric guitar, wedding ring or favorite bicycle.)" with "N" selected. A green "GET QUOTE" button is at the bottom.

9) Select desired policy and coverages

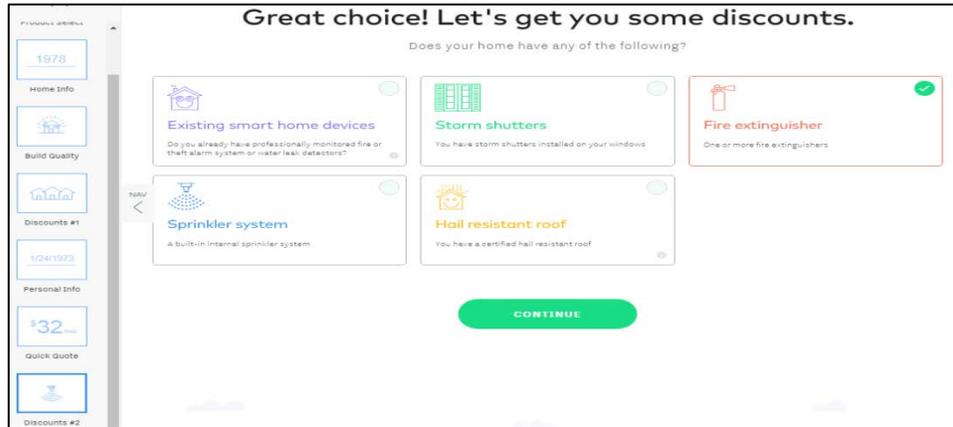
- Compare the 3 quotes and their coverages, select best policy for your clients needs

The screenshot displays three policy options side-by-side, each with a "SELECT" button. The background is green with the text "Voilà! Here are three great options for you." at the top.

Policy Name	Monthly Premium	Coverage for Home	Liability	Personal Property	Deductibles (General)
THE ESSENTIALS <small>35% CHOOSE THIS</small>	\$58 /mo	\$295,000 <small>+ 25% ERC</small>	\$100,000	\$147,500 <small>ACTUAL CASH VALUE</small>	\$2,950
OUR BEST VALUE <small>50% CHOOSE THIS</small>	\$82 /mo	\$295,000 <small>+ 35% EXTENDED REPLACEMENT COSTS</small>	\$200,000	\$206,500 <small>REPLACEMENT COST</small>	\$2,950
EXPANDED PROTECTION <small>15% CHOOSE THIS</small>	\$98 /mo	\$295,000 <small>+ 50% ERC</small>	\$500,000	\$206,500 <small>REPLACEMENT COST</small>	\$2,950

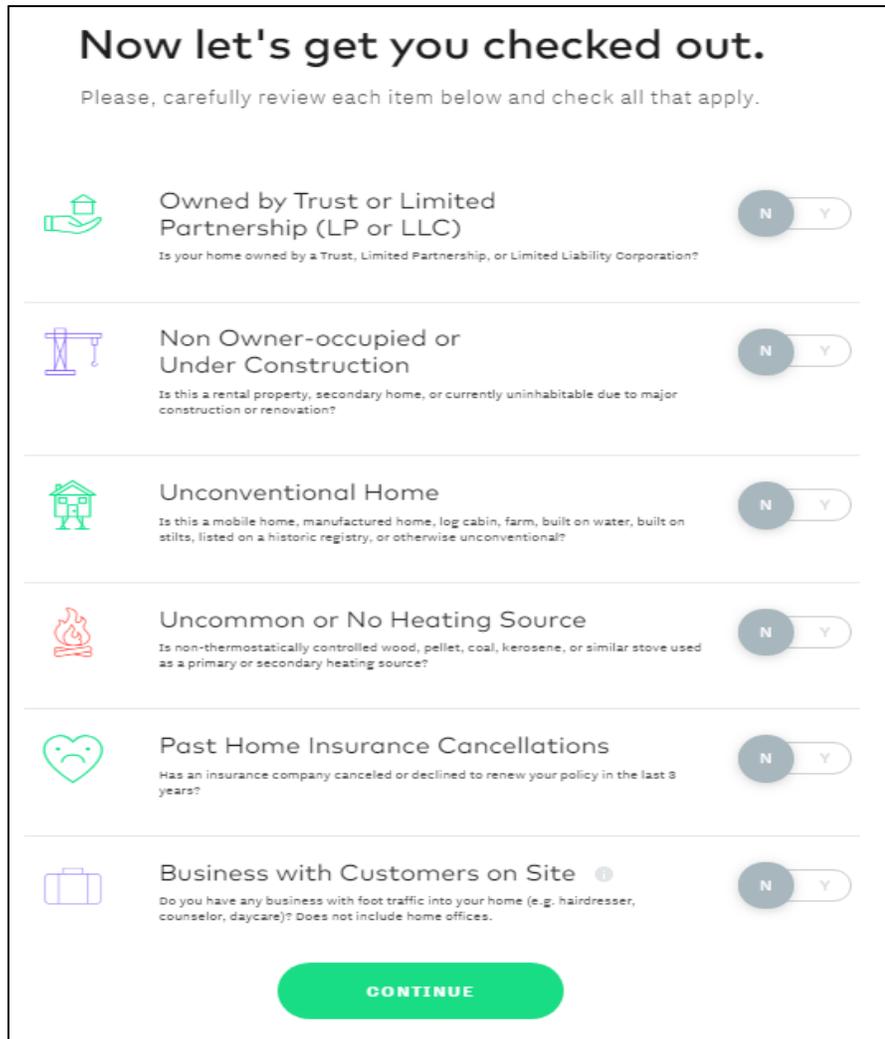
10) Discounts section #2 (choose all that apply)

- Existing smart home devices discount (click to select specific alarms/sensors)
- Fire extinguisher discount
- Sprinkler systems discount
- Hail resistant roof discount
- Storm shutters discount
- Click continue



11) "Now let's get you checked out" (choose all that apply)

- ownership type?
- Non owner occupied or under construction?
- Unconventional home?
- Uncommon or no heating source?
- Business with customers on site?



12) Run claims history

- Enter address of past/current residence and run claims report

Let's check your claims history, and we're done.

This only checks recent home insurance claims and does not affect your credit score.

 What was your primary address for the last year?

600 Arcadia Way, Celina, TX 

[RUN CHECK](#)

13) Review policy

- If any valuable items please click “sign up here” under valuable items protection
- Click ‘download your quote’ to download a quote to share with your client

Take a minute to review your policy.

Feel free to adjust your coverage, then checkout when ready

Your Hippo Plan

 STARTS ON 12/05/2019 [EDIT MY PLAN](#)

	DEDUCTIBLE	General	\$2,950
		Hurricane 	\$2,950
		Wind or Hail	\$5,900
	YOUR HOME \$295,000	Home Rebuilding Coverage	\$295,000
		Extended Replacement Cost	\$79,750
		Separate Structure	\$59,000
		Loss of Use	\$88,500
		Roof Surface Coverage 	Repl. cost
		Ordinance Protection	\$29,500
		Foundation and Water Coverage	None
	YOUR BELONGINGS \$147,500	Personal Property	\$147,500
		Replacement Cost	No
	PERSONAL LIABILITY \$100,000	Personal Liability	\$100,000
		Medical Payments	\$1,000
	ENHANCED COVERAGE	Domestic Workers	Included
		Home Office	\$8,000
		Computers	\$8,000
		Water Backup	\$5,000
		Loss Assessment	\$1,000
		Jewelry & Watches	\$2,000

Your Premium

\$ **58**.00/mo
\$696/yr

[ENROLL](#)

[Click here to sign up valuable items](#)



Valuable Items Protection

[SIGN UP HERE](#)

[click here to download your quote](#)



[DOWNLOAD YOUR QUOTE](#)

UNDERSTANDING YOUR PLAN

 **Y**

This policy currently includes a Smart Home Discount! Hippo will send a complimentary wireless sensor kit to help detect things like water leaks and smoke & carbon monoxide alarms - and save your customer \$18/yr.

14) Click "Enroll" and bind your policy!

- Choose whether or not to enroll with or without Hippo's smart monitoring system (discount provided for enrolling with smart monitoring system)
- email will be sent to client for them to sign off on policy and then if they do not within 7 days the policy will be cancelled.

Take a minute to review your policy.
Feel free to adjust your coverage, then checkout when ready

Your Hippo Plan

STARTS ON 12/05/2019 [EDIT MY PLAN](#)

DEDUCTIBLE

General	\$2,980
Hurricane (1)	\$2,980
Wind or hail	\$8,800

YOUR HOME \$295,000

Home Rebuilding Coverage	\$288,000
Extended Replacement Cost	\$78,780
Separate Structure	\$69,000
Loss of Use	\$88,800
Roof Surface Coverage (1)	Repl. cost
Ordinance Protection	\$29,800
Foundation and Water Coverage	None

YOUR BELONGINGS \$147,500

Personal Property	\$147,800
Replacement Cost	No

PERSONAL LIABILITY \$100,000

Personal Liability	\$100,000
Medical Payments	\$1,000

ENHANCED COVERAGE

Domestic Workers	Included
Home Office	\$8,000
Computers	\$8,000
Water Backup	\$8,000
Loss Assessment	\$1,000
Jewelry & Watches	\$2,000

Your Premium

\$ **58**.00/mo
\$696/yr

Click to enroll

ENROLL

Valuable Items Protection

[SIGN UP HERE](#)

[DOWNLOAD YOUR QUOTE](#)

UNDERSTANDING YOUR PLAN

This policy currently includes a Smart Home Discount! Hippo will send a complimentary wireless sensor kit to help detect things like water leaks and smoke & carbon monoxide alarms - and save your customer \$18/yr.



Congratulations on making your customer's home smarter and safer!

Confirm these details with the customer in order to secure the Smart Home discount of \$18/yr:

To read to customer: You must install and activate the complimentary sensor kit (that Hippo will ship to you within 5-6 days of your policy effective date or your premium will increase by \$18/yr, and you will be charged for any discount amount already earned).

To be eligible, you must meet the following requirements:

- Have WiFi enabled in your home
- Have a smartphone with iOS 10 (or newer) or Android 6 (or newer)

Your privacy is important to us. Hippo only monitors activation and device status, not detailed information about your home. The device is truly complimentary - there are no hidden or monthly fees.

Enroll w/o smart monitoring discount **ENROLL WITHOUT DISCOUNT** **CONFIRMED BY CUSTOMER** **Enroll w/ smart monitoring discount**

Valuable Items Protection

YOUR BELONGINGS \$147,500

Personal Property	\$147,800
Replacement Cost	No

PERSONAL LIABILITY \$100,000

Personal Liability	\$100,000
Medical Payments	\$1,000

ENHANCED COVERAGE

Domestic Workers	Included
Home Office	\$8,000
Computers	\$8,000
Water Backup	\$8,000
Loss Assessment	\$1,000
Jewelry & Watches	\$2,000

UNDERSTANDING YOUR PLAN

This policy currently includes a Smart Home Discount! Hippo will send a complimentary wireless sensor kit to help detect things like water leaks and smoke & carbon monoxide alarms - and save your customer \$18/yr.

Thanks for binding with
Hippo!