

Insurance Center Group

Referral Business Plan

Goal:

Establish a strategic partnership to:

- Safeguard your business by providing an effective (and managed) option,
- To place customer's business, you are unable to write,
- With someone who is working in partnership with you!

How it Works:

- Introduce your customer to our representative and recommend utilizing our services to meet their insurance needs.
- Contact your representative at The Insurance Center with situational information.
- We will quote and attempt to write the business.
- You receive details and confirmation of results.

Our Pledge to You:

- Insurance Center Group will not solicit other products (or cross sell) from your customer and will refer requests for additional business back to you.
- All sold customers will be identified (as your customer) in our management system and will be noted as "not to be solicited for additional business".
- In the future, if you solicit your customer to return to you, the Insurance Center Group will not interfere, and recommend returning to you.
- A written agreement will be drafted and signed to reflect the above.

Business Referral Agreement

This agreement is between the Insurance Center Group (ICG) and _____
(Agent)

Agent will refer business to ICG as an alternative to not writing business (outside agent's company guidelines).

ICG pledges and affirms the following:

1. ICG will not solicit, or sell other products, to Agent's referred customers.
2. ICG will refer requests from customer for additional insurance products back to Agent.
3. Agent's customer's will be identified (as such) in ICG's agency management system with note "not to be solicited for additional business".
4. If Agent solicits customer to return in the future, ICG will not interfere and recommend customer return to Agent.

Agent

Date

The Insurance Center Group

Date

Greg Daniels (Director of Operations)