

TRAVELERS APPOINTMENT CHECKLIST

The following are the items that should be included in your email submission to Travelers to be appointed:

- Prospective Agent Information Form (under Section 2 on website)
- ASCK Production plan signed (agreeing to production commitment and Quoting Behavior Expectations). Be sure to complete the section under the yellow line that asks, “Why do you want a Travelers appointment?” (under Section 2 on the website)
- Lexis Nexis Node ID (if you do not have one you can go to this link to apply and list Travelers as a sponsoring company: <https://insurancesolutions.lexisnexis.com/idslogin/newagent/>)
- Your website address (asked for on the application.)
- Social Media Platforms – Facebook? LinkedIn? Twitter? Instagram? You can write this in on the Prospective Agent Information Form or include in your email.
- Copies of agency and agent licenses for those in the agency to be appointed.
- Production reports from your top three personal insurance carriers.
- Copy of E&O declaration page.
- If you are a new start-up agency (in business less than two years) we will also need a copy of your written business plan.



Submit the information to:

Melissa Westbrook
Sales Executive | Personal Insurance
O: 214-200-2163
C: 913-263-5046
F: 866.540.6459