



Producer Appointment Checklist

FORMS REQUIRED FOR AGENCY APPOINTMENT PROCESSING

- Producer Appointment Questionnaire
- Producer Agreement
- W-9 (first page only)
- Copy of Producer License (Agency's License)
- Copy of E&O Coverage (minimum of \$1 million per occurrence required)

PRODUCER APPOINTMENT QUESTIONNAIRE

Legal Agency Name: _____

DBA (if applicable): _____

Principal's name and producer license number: _____

Mailing Address: _____

Telephone Number: _____

CONNELLY **CAMPION** **WRIGHT**

704 Belmar Plaza ♦ Belmar NJ 07719
732-280-2800 ♦ Fax 732-681-4951
ccwinsurance.com ♦ ccw@ccwinsurance.com



After hour's phone number: _____

Fax Number: _____

Best Email Address: _____

Tax and/or Federal ID Number: _____

Total Number of employees: _____

Total Number of licensed employees: _____

Has any officer, owner, or partner ever (attach explanation for any "Yes" answer):

1. Been charged with, arrested for or convicted of a felony?

YES ___ NO ___

2. Been denied, suspended and/or revoked any insurance license applied for or issued?

YES ___ NO ___

3. Been disciplined by any insurance regulatory body?

YES ___ NO ___

4. Filed bankruptcy, been sued or had a judgment entered?

YES ___ NO ___

Comments:



PRODUCER AGREEMENT

This agreement is entered into by and between CCW LLC t/a Connelly-Campion-Wright Insurance. (hereinafter called "CCW") with offices located in the County of Monmouth

and _____ (hereinafter called the "Producer") with its main office located at: _____

WHEREAS, "Producer" wishes to access Insurance Companies through Connelly-Campion-Wright and

WHEREAS, Connelly-Campion-Wright is willing to offer its facilities to "Producer" for placement of such insurance contracts;

NOW THEREFORE, in consideration of the mutual covenants and agreements set forth herein and the effort, time and expense to be devoted by Connelly-Campion-Wright to place such insurance contracts, it is agreed as follows:

1. Producer warrants that it holds all necessary licenses and approvals to do business hereunder and intends to place insurance contracts through Connelly-Campion-Wright in compliance with all applicable laws and regulations pertaining to the placement of such insurance contracts. Producer further warrants that it will comply with all applicable provisions of any Code of Conduct of each insurance company with which Connelly-Campion-Wright will place the insurance contracts. Connelly-Campion-Wright may terminate payment of commissions to Producer should Producer be in violation of the terms of this Paragraph.
2. Producer does not have any right or authority to bind or accept any risk on behalf of Connelly-Campion-Wright or any insurance company represented by Connelly-Campion-Wright.
3. Connelly-Campion-Wright recognizes and acknowledges the independent ownership by the Producer of the insurance placed by Producer through Connelly-Campion-Wright pursuant to this Agreement.
4. CCW shall pay the Agent a commission 10% of the premium for new and renewal business as compensation for the Agent's continued relationship with the client. It is



expected that the Agent will communicate directly with the client in response to any service questions or claims inquiries. CCW will continue to pay commission to the Agent as long as the Agent participates in managing that relationship. If the Agent decides to no longer have a relationship with the client, CCW will notify the Agent in writing that commissions to the Agent will cease. If the policy cancels, the Agent will be expected to return the portion of the commission that was not earned.

5. Producer shall immediately notify Connelly-Campion-Wright of any information it receives from any source which materially impacts any of the insurance contracts placed pursuant to this Agreement.
6. Connelly-Campion-Wright agrees to use information disclosed to it by Producer solely for the purpose of fulfilling its obligations under this Agreement and will not use such information to directly market other lines of insurance coverage to Producer's clients. This obligation will not apply to information which: (i) was known to Connelly-Campion-Wright prior to receipt hereunder; (ii) at the time of disclosure to Connelly-Campion-Wright was generally available to the public, or which after disclosure hereunder, becomes generally available to the public, through no fault of Connelly-Campion-Wright; or (iii) is hereafter made available to Connelly-Campion-Wright from any third-party having a right to do so on a non-confidential basis.
7. Producer agrees to maintain and provide proof of Errors and Omissions Insurance Coverage with a limit of liability of not less than \$1,000,000.
8. Producer is an independent contractor and not an agent of Connelly-Campion-Wright or any company represented by Connelly-Campion-Wright.
9. Each party shall indemnify and save harmless the other party against any and all claims, suits, liabilities, losses and damages (including attorney's fees), arising out of or in any way resulting from the acts of the indemnifying party.
10. This Agreement supersedes all previous agreements regarding this subject matter, whether oral or written. It may be terminated by either party at any time upon written notice, but such termination shall not affect the continued application of this Agreement to policies in place pursuant to this Agreement.
11. This Agreement shall be governed by the laws of the State of New Jersey and Producer agrees to submit to the jurisdiction of the federal or state courts located in New Jersey.



Producer Agreement Acknowledgement

AGENT:

Name as appears on license (Agency Name): _____

By: _____ Title: _____

(Print Name)

Signature: _____ Date: _____

CCW:

By: _____ Title: _____

Signature: _____ Date: _____

Please sign and return all 5 pages via email (to ccw@ccwinsurance.com) or fax 732-681-4951 or US Mail to:

CCW Insurance
704 Belmar Plaza
Belmar, NJ 07719

We look forward to working with you! If you have any questions along the way, please contact:

Kacy Campion Renna, CIC, President
phone: 732-280-2800 x21
email: kcr@ccwinsurance.com

**Request for Taxpayer
 Identification Number and Certification**

**Give Form to the
 requester. Do not
 send to the IRS.**

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____	
	<input type="checkbox"/> Exempt payee	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
City, state, and ZIP code		
List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number										
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Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.