

**\*For office use only**

**Licensed Agent Checklist**

- Initial Application.
  
  - Contract if approved (Include Business approval form if they need one)
  - Not approved-Thank you for your interest letter.
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- Welcome packet W/ Meet our team info.
  - Window Decal.
  - W-9/ ID /Voided check/Copy of EIN letter.
  - Completed list of requirement.
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- Quote questionnaires.
- List of commissions.
- List of carriers .
- WC codes.
- Website access-Training videos.



# Grassroots Insurance Group Application Form

Name : Last Name, First Name, Middle Initial

Date

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Address

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City or Town

State

Zip Code

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Date of Birth

Telephone Number: Home/Cell

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*U.S social security number*

E-mail Address

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Do you have a New Jersey Property and Casualty License?    Yes    No

If so, License number:

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Date of license:

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Are you eligible to work in the united states:    Yes    No

Are you under the age of 18?                      Yes    No

If so are you eligible to show proof for work eligibility?    Yes    No

When are you available to start?

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What type of business do you own today?

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Experience: number of years in business

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Describe your clientele: % of clients that are Business owners and Homeowners.

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How many clients does your business see each day?

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Welcome to Grassroots Insurance Group, LLC.,

This organization is to help small and individual business owners start a successful career in the Insurance business. GIG specializes in both Personal and Commercial Insurance along with Life and has multiple markets with Insurance carriers. Our goal is to empower the agent to build a successful business as a group. Each member will be trained and giving the tools to build their own book of business.

Our expectation is that each member fully cooperates with the bylaws of said organization and adheres to the contract signed by the member. Each member must have a Property & Casualty License in the State where he or she will do business. It is also required that the member has an Errors & Omission Insurance policy. If the member has a public office he or she will also need to have General Liability as well if the member has employees must carry Workers Compensation policy.

We are interested in working with law abiding individuals that will comply with the requirements of the State in which they are doing business.

GIG will offer the member the opportunity to have markets with an Insurance carrier, understanding the the Insurance Carrier will be interviewing and approving each member individually. GIG is not responsible if the member does not get approved by an Insurance Carrier. GIG will help facilitate the opportunity to have a Insurance carrier meet the member and guide to make the opportunity a possibility.

GIG will offer a agency management program to each of its members, to help the member manage their accounts. The management will keep an electronic file of each of their clients with copies of all documents offered to their clients. Insurance Carriers will download and upload policy and any other information pertaining to the client. The Member will also input any data that applies to their client. The agency management will let the member know how many clients they have in each of the product sold to the client. This program will have a monthly cost that will be discuss the member's contract.

Technology is a pertinent part of servicing the clients, in your contract we will provide a list of things that each member will need in order to provide great service to their clients. GIG wants to offer the best opportunity not only to the member to be successful but that the client has a great experience with each business transaction they may have with our members. Our team will help the member by advising what is required and visiting their location to train and install the systems in place, this also has a cost that will be discuss in the member's contract.

Education is big part of being successful in the insurance industry. It is important that each member not only updates their Continuing Education requirement by the State in which they are licensed but that they also, meet for sales, management, marketing and accounting training offered by GIG.

We welcome you to GIG and hope that this will be a long term successful relationship. Our team is here to serve you and empower your journey in the Insurance industry.

Sincerely,

Esther Tanez, CEO of Grassroots Insurance Group, LLC.



Only for licensed agents who have signed contract.

Here is a list of cost that will be part of running an insurance agency.

EZLYnx is a management program and a multi quoting site each member will pay \$500 to install program and will be billed \$175 a month for 3 users and \$60 for each additional user per member with access to Ezlynx.

Installing the systems and programing each computer to communicate with our site, able to scan and all technical support has a cost of \$450 per day, usually is a 1 day project.

Marketing is a crucial part of growing our business, all marketing efforts will be offered to our members. At times we will share TV, Radio and social marketing cost to market all agency. This will be discuss prior to signing up with all members.

Each member has to pay their own continuing education program, but if we have any free courses available we will make sure that all members take advantage of any free or discounted classes.

Each member have to purchase their own General Liability, Workers Comp and most important Error and Omission Policy. This also include the cost to keep their Licenses active with the States that the member may be licensed.

This may have changes in the future and will be discuss with each member of Grassroots Insurance Group, LLC.



## List of Requirements

**The following documents must be submitted:**

- Signed contract**
- Copy of Licenses- Both personal & Business.**
- Copy of General Liability insurance policy.**
- Copy of Worker compensation insurance policy.**
- Copy of E&O (Errors and omission) insurance policy.**
- Voided check (Must be company check)**
- ID**



**Welcome to our family, meet our team. We are all here to serve you , this brief description will help you know who to contact with your specific need.**

**Esther Tanez** - Founder of ESTIR Inc Insurance agency.

Email: [Esther@estirinsurance.com](mailto:Esther@estirinsurance.com)

**Eduardo Saldivar**-Manager & Commercial specialist

Email: [Eduardo@estirinsurance.com](mailto:Eduardo@estirinsurance.com)

- All Commercial Auto/Business/Professional Liability quoting
- Proof of insurance/Certificates
- Audits
- Cancellation requests
- Commercial claims

**Francisco Tanez**- Personal lines specialist

Email: [Francisco@estirinsurance.com](mailto:Francisco@estirinsurance.com)

- Home/Vacant Home/Auto quotes/ flood/ Umbrella & more.
- Cancellation requests
- Claims
- Endorsements (change of address, mortgagee,add driver)

**Areli Castillo**- Accounting

Email- [Areli@estirinsurance.com](mailto:Areli@estirinsurance.com)

- Payments/Refunds/Refund status
- Reinstatements

**Jaslyn Taveras**- Retention Dept

Email- [Jaslyn@estirinsurance.com](mailto:Jaslyn@estirinsurance.com)

- Renewal reminders/Notice of cancellation reminders.
- Underwriting requests - (recommendations from insurance companies, address verification )

\*All Underwriting responses like documents or pictures must be sent to Jaslyn's email or our texting number (973) 846-2036.



## Commercial Insurance certificates/Requests

*All certificates/Proof of insurance must be requested via Email, Fax or text.*

- Email: [Eduardo@estirinsurance.com](mailto:Eduardo@estirinsurance.com)
- Fax: 888-959-0340
- Text: (973) 846-2036

### What info we need in order to issue a certificate:

1. Company name or Person name.
2. Address.
3. Email or fax # where we can send proof to.

### How to cancel a policy

*\*Every policy enrolled on EFT should be cancelled at least 2 weeks before next withdrawal to avoid possible overdraft on account.*

#### **Homeowners:**

- Signed cancellation letter.
- Copy of new declaration page with other carrier.
- Copy of sale.

#### **Auto:**

- Signed cancellation letter.
- Returned plates receipt along with vehicle registration.
- Copy of new declaration page with other company.

#### **Commercial:**

- Signed cancellation letter or come to office to sign form.





Authorization Form:

Date:

To Whom It May Concern,

I, \_\_\_\_\_owner/manager of \_\_\_\_\_business authorize  
\_\_\_\_\_ to share my Insurance Documents and  
Information with an Insurance agent in effort to review and quote.

I also authorize the agent to reach out to me to discuss the insurance policy, quotes and  
other options.

\_\_\_\_\_  
Owner/Manage

