

BROKERS REPORT

Please submit this report with each application for coverage through Lloyd's, London and complete the Application Submission Checklist.

- A cheque is not required to begin the underwriting process although we do recommend it, to expedite placement of the policy once approved.
Cheques are payable to "**Hunter McCorquodale**".
(Please note: No interim or conditional coverage is provided during the underwriting process.).
- Unless agreed to in advance no medical evidence should be ordered or submitted until the underwriter has had an opportunity to review the application.
- If your client has been declined for disability insurance coverage in the last 6 months or has applied for life or disability insurance in the past 6 months or has an application for insurance pending, please advise what medical requirements were obtained, and by which insurance carrier. (policy numbers would also be helpful).

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- Please specify here if the premiums are to be paid by someone other than the policy owner

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- Is there any other information that would be helpful in assessing this application?
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Lloyd's Application Submission Checklist

Have you included ...

- ☐ A copy of your insurance license(s) and proof of errors & omissions insurance.
(contracting documents will be sent out by our administrators during the underwriting process)
- ☐ A fully completed application including your signature and that of the proposed insured.
- ☐ A signed and dated copy of the quotation, or provide quotation ref. # _____
- ☐ Financial evidence and/or signed financial authorization form (must be submitted within 30 days)
- ☐ Submission of other requested information as outlined on the quotation (e.g. copy of buy/sell agreement, questionnaires, letters from employers, travel itineraries, etc.)

**Medical and financial underwriting requirements are normally included on the quotation.
Please do not order or submit any medical underwriting requirements until the underwriter confirms these requirements after initial review of the application.**