

YOUR CARES & CONCERNS ARE MAKING A
DIFFERENCE!

01

SERVICE LINE
COVERAGE AVAILABLE
ON P3

08

SHORT TERM
HAULING FOR HIRE
COVERAGE

02

COMPANY-APPROVED
TWO-WAY TEXTING
CAPABILITIES FOR
AGENT'S USE

07

MULTI-TIER APPROACH
TO AUTO RENTAL
REIMBURSEMENT AND
DIFFERING PREMIUMS

THE **Agents.**
Association
Representing Insurance and Financial Services

03

CLIENTS CAN
MAINTAIN A POLICIES
CURRENT TERM
BANDING AS A
RESULT OF PARTIAL
CONVERSION

06

RIDESHARE
(UBER/LYFT) RATING
IN P3

04

IMPLEMENTATION OF
INFORCE PENDING
REPORT

05

A SALES
PRESENTATION
SIMILAR TO
SUPERCHECK FOR
NEW BUSINESS

GENERAL CHANGES

- Able to submit an event for co op after registering and not needing to wait until the event is held
- Access to discounted licensing test material through Kaplan
- Agents able to utilize Microsoft Teams in their office
- CRM notification when a commercial or commercial ag policy is cancelling
- ACU able to send out invoices when a client asks while on the phone with them
- Farmowners now receives up to five UARs credit on the commission schedule instead of just two
- Amount owed for a late payment now included on the notice in CRM
- Access on fbfs.com now accessible to more than just the named insured
- Ordinance & Law, Emergency Roadside Assistance and Rental Reimbursement statuses will be added to the CRM Account Rankings
- Quote summary is now available to email quickly and easily from CRM
- CRM notification to agent on the day after the due date if a mortgage billed client has not paid
- More brokerage information in CRM

FINANCIAL SERVICES

- Required Minimum Distribution amounts for IRA annuities included on Homefield
- Financial Services discount for lower life insurance face amounts as well as provide a discount for qualifying deferred annuities

P3 CHANGES/COMMERCIAL

- Simplified the process for obtaining the Safe Young Driver discount
- Enhancements to claims notifications
- Premium differentials for business ownership eliminated
- More bilingual representatives to assist clients with billing questions, claims questions
- Increase in tree removal coverage
- Pop up implemented in P3 to remind users of the need to update addresses in the Driveology tab
- Revisions to the wording on the commercial audit paperwork
- Increase in emergency roadside assistance limit
- Able to change from annual pay to other frequencies without contacting underwriting
- Ability to quote multiple and lower deductibles on farmowners policies in addition to homeowners using the quote deductible feature on the rating tab
- Use of an appropriate individual's underwriting level for non-individual entities such as businesses, estates, trusts, etc.
- Streamlined process for obtaining vehicle symbols
- Allow transfer of the CBR score of a head of household or their spouse to a new policy in all states except UT.
- New mortgagee refund process
- Children's restraint seats be considered part of the automobile when a claim occurs
- Premium calculation for the Farm/Ranch Equipment Breakdown coverage no longer includes livestock or grain insured as scheduled or unscheduled FPP.
- Dispatching assistance on comp/collision claims if a credit card is provided. On covered losses this expense will be reimbursed by the claim representative
- Replacement cost is available on pivots over 20 years of age.
- 30 day grace to add a vehicle to a policy be extended to trailers

TOP 10 C&C'S

1. We request that the DocuSign email the client receives states to enter the last 4 of phone number on file
2. Any form that may require a signature have docusign options that are outside of binding changes in P3 and ability to reset/resend that form
3. Ability to share a life illustration that our team creates
4. Able to write Replacement Cost and Actual Cash Value on inland marine coverage on a commercial policy, whether it is a CPP or BOP.
5. Being able to email certificates of insurance directly from CRM to either the agent, service/sales associate, client and/or the certificate holder
6. Any life documents that are currently mailed to the agents office be changed to notifications in CRM
7. P3 for a popup reminder when binding a change to notify us that there are multiple billing clients and to make sure that the addition or subtraction to the policy is being billed to the proper bill client
8. Add a rider on our personal lines policy that would insure a residence for short term or nightly rental coverage such as a VRBO and Airbnb scenario
9. Driveology on Commercial vehicles to provide an additional discount
10. Annual statements for annuity products be produced and sent after the 10th of every month to reflect the current interest that is credited to that policy