

BROKER APPOINTMENT APPLICATION

Legal Name of Brokerage

Trading Name of Brokerage

Main Office Address

Main Office Phone Number

List of Branches

Name (if different)	Address	City	Province	Phone #

Complete the attached Excel file if you have more than 5 locations



Current Contracts

List all contracts with Insurance Companies

Insurer	Year Appointed

List all MGA's and Wholesaler's

MGA & Wholesaler Name	Annual Premium

Points of Contact

Complete the attached Excel file if needed

Area	Name	Title	Email	Phone #



Electronic Data Transmission Contacts

Area	Email
Accounting	
Bulletins	
Product Training	

Canada’s Anti-Spam Law (CASL) requires consent for our electronic messages.

Do you consent to Taycon Risk sending emails to your Brokerage? Yes No

DRUM (Digital Rating & Underwriting Management) is our self-service platform where you can quote and issue documents on your schedule.

- For all brokers, we will require a general email address so that we can forward a copy of all policy activity. This is a great way for management to be able to audit the process. (Think about – taycon@yourbrokerage.ca)
- Each individual’s username will be their company email address. All brokerage users can view all brokerage transactions. Our platform records activity by username.
- When one of your users enters a transaction on the platform, the user will receive a copy of the documents, as well as the general email provided below

General Email for Policy Delivery:

If more than 5 users, please complete the attached spreadsheet. If you have multiple branches, please complete the Branch field.

Name	Email Address	Branch



Errors and Omissions Coverage

Insurer _____ Policy# _____

Limit _____ Expiry Date _____

Have there been any E&O claims in the past 5 years? Yes No

If yes, please explain:

Corporate Licensing

Province	License #	Expiry Date

Has the Brokerage had any license(s) suspended, terminated, or been fined? Yes No

Has the Brokerage or any licensed individual representing the Brokerage been reprimanded by a Regulator in the past 5 years? Yes No

If yes to either question above, please list & explain

Agreement

I declare that I am authorized to disclose the information in this application and authorized to sign on behalf of the legal entity listed in this application.

Signature

Print Name

Title

Date

Once completed, please email the signed application to brokers@taycon.ca