

Imeriti, Inc. Licensing Procedures

In order to write new business, you must be appointed through Imeriti for each insurance company you wish to write.

You MUST get new appointments for each insurance company even if you were previously appointed through another broker/dealer or wholesaler or you WILL NOT BE PAID CORRECTLY!

Try our online appointment system:

1. Go to "Agent Tools" on the Imeriti Website.
2. Select "Online Appointments".
3. Create a Username and Password and follow the instructions.

This system will allow you to fill out ONE online app and choose ALL of the insurance companies you would like to be appointed with.

To obtain appointment paperwork for individual insurance companies, contact Imeriti (800) 921-3100 or email licensing@imeriti.com.

Fax completed paperwork and a copy of your insurance license for all states you are soliciting business to (866) 801-3507.

If other documentation is needed, Imeriti will contact you.

Once your appointment is complete, Imeriti will notify you of your agent code via email.

*****Sensitive States to Solicit Business: YOU MUST BE APPOINTED PRIOR TO SUBMITTING NEW BUSINESS IN THESE STATES:**

Georgia
Kentucky
New Mexico
North Carolina

Pennsylvania
Utah
Washington
Wisconsin

www.imeriti.com

Offices in California | Washington | North Dakota

On-Line Appointment Instructions

Go to www.imeriti.com.
Click on "Sales Tools" at the top of the page.
Click "Online Appointments"
Click "**Agent Registration**"

Complete.
Click "Register"
Click "Continue"

Log In

Click "Start Contracting Status"
Click "Continue Questions"

NOTE: If you are ready to submit business, please know that certain states have **pre-appointment requirements**. Contact Imeriti with any specific questions.

Click "Continue Questions"

Select which companies you would like to be appointed.

****Only select companies that you are going to write business with in the near future.****

(Most companies terminate for lack of production and are hesitant to reappoint due to state appointment fees.)

Click "Continue Questions"

Continue to answer questions.

Answer YES to E&O Insurance. If you do not have Errors & Omissions specifics, please type "unknown."
Continue to answer questions.

Under your home address information, scroll to the right to see the radio buttons to answer yes or no for carrier affiliations.

Continue to answer questions.

ANSWER THIS QUESTION "YES"

"Do you have an office address, phone number or fax number or a tax identification number for your business?*" **Then complete the appropriate information (i.e. address, city, state, zip and phone)**

When asked if you would like to assign your commissions, answer YES if your commissions are payable to another firm/person.

Click "Continue Questions"

Q: What is the name of the person or entity (Assignee) to who you would like to assign commissions?

A: Provide the name of the agency that will pay you.

Continue to answer questions.

At the end of the interview, please AUTHORIZE the companies that you would like to be appointed with.

Return to the Menu:

- PRINT & SUBMIT THE FOLLOWING COVERSHEETS TO THE INDICATED FAX NUMBERS:
- Electronic Signature (required) **SIGN DARKLY**.
- Individual Insurance License (required)
- Errors & Omissions insurance (required)
- Legal/Other (only if you have supporting documents to any legal questions answered "yes.")

*If you choose to "Continue Contracting Questions Later" and want to go back to where you were in the interview, please click on the blue tab at the top of the page (ex. License Information.)

**If you have any additional carriers you decide to want to be appointed with, you can log back in at a later date.

Contact Imeriti with any specific questions.

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