



Working With Chubb Access

Agenda

- Who is Chubb
- Your Chubb access appointment
- Training and Resources
- Appetite and quoting
- Change of producer
- Billing
- Commissions
- Downloads & Alerts

Who are we?

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Chubb Insurance Group

The world's largest publicly traded property and casualty (P&C) insurer with a market cap of **\$67 billion**

\$167 Billion
in total assets
\$36.4 Billion
in GWP

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Local Branch Offices
in North America
with the ability to
write business in over
200 countries

Approximately
1700
underwriting experts,
risk engineers, and local
claims professionals
dedicated to our agents
and customers

Over
200
years
in the insurance industry

Core operating insurance
companies are rated
"AA" for financial
strength by S&P and
"A++" by A.M. Best.

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Chubb Insurance Solutions agency (CISA)

Chubb Insurance Solutions Agency helps provide a pathway to incubate, manage and market all Chubb products to new quality independent agents.



■ Distributes and Markets the full suite of Chubb personal and commercial products



■ Team of licensed insurance professionals, with Chubb product and service expertise



■ Fully licensed in all 50 states for Property, Casualty, Accident, Health and Surplus Lines.

Chubb Insurance Solutions Agency, Inc. ("CISA"), a licensed agency and wholly owned subsidiary of Chubb Limited.

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Chubb Access Appointment Binding Authority

Personal Lines
Farm and Ranch Commercial
Insurance:
Middle market & Major
accounts

- These niche industry segments are specialized and require product and underwriting expertise.
- For these business segment agents do not have binding authority. Binding authority resides with Chubb Insurance Solutions.

Small Commercial
Insurance

- Small commercial requires an additional appointment and premium volume commitment.
- This business segment is automated on the marketplace platform.
- Appointed agents have binding authority.

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Benefits

- Access to over 300 personal and commercial insurance products
- Assistance Navigating Chubb products and services
- Chubb Product expertise
- Marketing Support
- Online quoting capabilities for Personal and Financial lines
- Access to Personal lines client policy via @chubb platform
- Upfront underwriting
- Training and education
- Coverage consultation from Chubb professionals
- Your Agency name appears on policy documents.
*CISA contact information prints on documents

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Agent Resources

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Training

We provide a variety of tools, resources and programming to help you succeed. Our catalog of training courses can be accessed through the Chubb Access **website** : www.Chubb.com/Chubbaccess

New agent training

- Appetite guide
- Regional training
- Products and services
- Systems:
 - How to navigate @chubb portal and view policy information
 - How to quote online in MPRT and Decision Point

Stay up to date

- Monthly featured webcasts
- Monthly newsletter with the latest product information and offerings.
- Marketing Collateral
- Resource Library

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Chubb Access website

Designed with you in mind, the Chubb access website is loaded with information to help you learn about Chubb.

Web link: www.Chubb.com/Chubbaccess

Contact information

Appetite information

Marketing Collateral

Training Modules

Link to online Chubb portal

Much more

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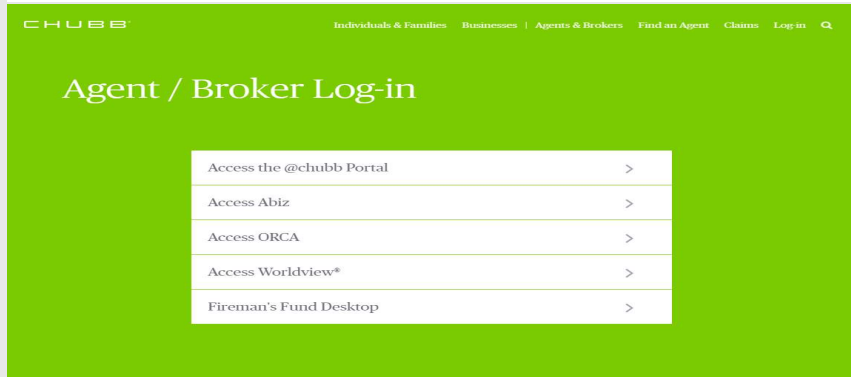
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Chubb Agent Portal

The @chubb agent portal offers online services and resources for agents.

PRS: Through the portal agents can access policy documents, policy information, billing information, quote new business, view contracts and guidelines.



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Chubb portal PRS

Quoting Systems

- PRS Masterpiece real-time
- PRS Inamar rating system
- CI Decision Point

PRS Policy information

- Policy details
- Billing information
- Claims information

PRS Policy Documents

- Newline and renewal paper
- Copy of endorsements
- Home assessment reports
- Auto ID cards
- invoices

PRS Masterpiece manuals

- Contracts
- Coverage summary guides
- State specific information and updates

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Accessing the @Chubb portal

- An agency administrator application is completed at enrollment to request access to the online Chubb portal.
- The designated Agency Administrator for your agency will have the authority to:
 - request new User IDs
 - revoke existing IDs
 - perform other User ID maintenance functions.



You can expect to receive your @Chubb portal User ID Within 4 weeks of submitting the completed agency administrator application.

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Appetite and Quoting

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PRS Target Market

Personal Risk Services Client is the successful, family or individual with significant assets:

- Home value > \$750,000
- Multiple homes
- Personal Collections
- High valued automobiles
- High Personal Excess Liability Limits

What to Avoid:

- Monoline CAT exposed business
- Unprotected home locations
- High profile individuals
- Clients with adverse loss history
- Monoline PPV autos
- Homes under construction or under renovation

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Personal Lines Quotes

What information is needed to obtain an accurate quote

- ✔ Insured Information: Date of birth and SS# (if available)
- ✔ Loss information and mitigation details
- ✔ Occupation details for each named insured
- ✔ Pertinent underwriting information
- ✔ Accurate and detailed information on the risk characteristics
- ✔ Account attributes
- ✔ Fire protection
- ✔ Security systems

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Personal Lines Quotes


<p>Masterpiece states</p> <ul style="list-style-type: none"> -Online quoting through Masterpiece® Real-time -Call us at 1-800-884-3770 -Email application to: chubbaccess@chubb.com 	<p>Non-Masterpiece states</p> <p>Kentucky, North Carolina, NJ auto, MA auto, SC auto, Hawaii and Virginia</p> <ul style="list-style-type: none"> -Email application to: chubbaccess@chubb.com <p>*quotes cannot be completed over the phone</p>
<p>Recreational Marine</p> <ul style="list-style-type: none"> -Online rating through INAMAR® -Call us at 1-800-884-3770 -Email application to: chubbaccess@chubb.com 	<p>Passport 360 & Chubb Flood</p> <ul style="list-style-type: none"> -Call us at 1-800-884-3770 -Email quote request to: chubbaccess@chubb.com



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Commercial Insurance Target Market

<p>Commercial Insurance Client :</p> <ul style="list-style-type: none"> ▪ Small Commercial* with revenue under \$10 million ▪ Commercial Middle Market with revenue up to \$1 billion ▪ Major Accounts are clients with more than \$1 billion in revenue <p><small>*Requires a different volume commitment, separate appointment, separate system access</small></p>	<p>Access risk appetite for Mid-Market on our Web App</p> <p>www.chubb.com/appetiteapp</p> 
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Commercial Insurance Quotes

Commercial Insurance

Email application and loss runs to :
chubbaccess@chubb.com

Private Company and Not-for-Profit Management Liability products

Online through Decision Point
 Email application to:
Chubbaccess@chubb.com

Farm and Ranch & Commercial AG

Email application and loss runs to:
chubbaccess@chubb.com

Small Commercial*

-Online through Marketplace

*Requires a different volume commitment, separate appointment and separate system access

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How do I bind coverage

Chubb access appointed Agents must speak to a licensed Chubb Insurance solutions representative to request for coverage to be bound.

The Chubb access AE completes a preliminary underwriting assessment of the risk. After reviewing the quote the CISA AE will confirm if coverage can be bound or advise if the quote requires underwriting review and approval.

Coverage cannot be bound via email or voicemail.

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Helpful information

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Change of Producer

Personal Lines:

A completed and signed accord Broker of record Form or Letter of authorization is required. The document must be signed by all named insureds.

Commercial Insurance:

A completed and signed letter of authorization form, signed by an authorized corporate officer, written on the insured's company letterhead is required. (accord forms are not acceptable)

The signed form or letter must clearly asks us to recognize a different producer of record & include:

- Name insured
- Current policy number
- Effective date
- Chubb producer code

The risk must meet Chubb Access underwriting guidelines.

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Chubb Billing

Payment options	Payment types	How to make payments
<ul style="list-style-type: none"> • 1 Payment • 12 Pay • Quarterly • Semi annual • Recurring: EFT or Credit card 	<ul style="list-style-type: none"> • Check /money order • EFT • All Credit cards 	<ul style="list-style-type: none"> • By phone • Online • By mail

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Commissions

- Commissions are paid according to the fee schedule that is part of your Chubb Access Agreement.
- Commissions are paid to you on the same schedule the policy payments are made.
- Commission statements and payments are mailed to your agency.
- For producer compensation and commission questions please email:
 - Kim Dawson-Hall email: kdawsonhall@chubb.com

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Downloads and My Alerts

Latest policy information

My Alerts



- PRS service online notification system.
- Automatically deliver copies of your clients' Masterpiece® policy, billing, appraisal and reference manual documents via email, to the individuals you designate to receive the online alerts

Downloads



Agents can sign up for policy Downloads to their agency management systems by submitting a **Download Request form**.

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Contact Us



1-800-884-3770



Sales: chubbaccess@chubb.com
Service: cccaccess@chubb.com



www.chubb.com/chubbaccess

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Become newly appointed with Chubb Access as a Networked affiliate

Contact



Sandi Smith, Operations
Administrator at Networked

E: sandi.smith@networkedins.com

P: 530.274.6945

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