

BACKGROUND AND PURPOSE OF THE MANUAL

Our Agency Procedures and Personnel Policy Manual was developed and written by PIA members serving on a special task force for the Carolinas Association of Professional Insurance Agents several years ago.

In the spring of 1997, the Manual was reviewed and modified by The National Association of Professional Insurance Agents' Errors and Omissions Committee and by officials of PIA's E&O underwriter, the Utica Mutual Insurance Company.

The Professional Insurance Agents Association of Virginia and the District of Columbia has now received permission from these groups to offer the Manual to you.

It has one objective in mind – providing insurance agencies with a guide to agency policies and procedures with can improve the agency's efficiency and operation. It's a good investment for your agency.

You have a choice of receiving it from us in a couple of difference forms. A hardcopy is available ready to be put in a three-ring binder. It is also available on a floppy disk in Microsoft Word. The cost is only \$20, which we believe you will agree is an excellent price.

Either format requires some changes to suit your agency. For example, you must fill in your agency's name, hours, holidays, etc.

CONTENTS OF THE MANUAL

Agency Procedures Section includes:

- Agency Background
- Profile of Agency Personnel
- Office Procedures
- Suspense System/Expiration System
- Accounting
- Business Processing
- New Business including Underwriting
- Renewal including Underwriting
- Audits
- Endorsements
- Binders
- Certificates of Insurance
- Inspections
- Claims Processing
- Mail
- Agency Records Retention
- Cancellation and/or Non-Renewal Processing

and much more...

Some Personnel Policy topics are:

- Absenteeism
- Clients
- Destruction of Records
- Educational Programs/Assistance
- Job Training
- Management Assistance
- Problems and Recommendations
- Public Relations
- Vacation/Holidays/Personal/Sick Leave

Detach and return to:

**PIA of VA & DC
8751 Park Central Drive, Su. 140
Richmond, VA 23227**

Or FAX to (804) 266-1075

Name: _____

Agency: _____

Address: _____

City: _____

State: _____ Zip: _____

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Fax: _____

_____ **Check enclosed in the amount of
\$20 made payable to PIA VA/DC.**

OR

_____ **Charge to: (we accept Visa/MC/Amex)**

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Cost: \$20 (CD-R format only)

What's in it for you?

A Manual designed by
insurance
agents for insurance agencies



A Manual approved by
The National Association of
Professional Insurance Agents
and by America's best errors
and omissions insurer



A Manual that's easily
tailored to suit your needs



A Manual at a low cost

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Designed for Insurance Agencies