

**DATE**

**RE: [Insert Policy Type]  
[Insert policy effective dates]  
Policy # [Insert policy numbers]**

Dear [Insert carrier contact name]:

Effective <today's date> please recognize United Valley Insurance Agency as our broker of record on the above referenced policy(ies).

Please provide United Valley Insurance Agency with copies of:

- Our current policy(ies) and all endorsements.
- The most recent application and worksheets completed for placement of this coverage.
- A current loss run covering all policies and policy terms insured by your company.
- Engineering surveys.

This letter will not be rescinded; therefore, please waive any waiting period which may apply. We look forward to your support in making this a smooth transition.

United Valley Insurance Agency will not be responsible for any return commission not earned by United Valley Insurance Agency or for inaccuracies on your current insurance policy(ies).

Thank you for your assistance.

Sincerely,