



# Referral Agreement Form

**Please Type or Print Clearly**

Business Name: \_\_\_\_\_

Address: \_\_\_\_\_

STREET, CITY, STATE, ZIP

Phone: \_\_\_\_\_ Taxpayer ID Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_ E-mail address: \_\_\_\_\_

Trust Account Location: \_\_\_\_\_

Referred By: \_\_\_\_\_ Date: \_\_\_\_\_

The undersigned has read and agree to the terms and conditions as defined under the **Referral Agreement Terms** page section. It is understood that this agreement does not carry any underwriting or binding authority and all applications must be submitted through South Coast Surety Insurance Services, Inc.

## **Referral Agreement Terms**

### **Authorities**

1. The Referrer may solicit applications for classes of Insurance, Fidelity and Surety Bonds for which a fee shall be paid.\*
2. The Referrer will not collect premiums or retain commissions on business placed with South Coast Surety Insurance Services, Inc. (Company) by or through the Referrer.
3. The Referrer is an independent contractor, not an employee of the Company which shall have no right within the authority granted.
4. The Referrer is not authorized to bind the company or to issue any bonds or policies, unless first signed by the company.

### **Duties**

1. The Referrer shall comply with all the rules and regulations of the Company.
2. The Referrer must immediately notify the Company if the Referrer has any knowledge of a possible claim in accordance with the California Unfair Claims Practices regulations.
3. Any unused Company supplies furnished by the Company to the Referrer shall always remain property of the Company.
4. The Referrer shall be responsible for any acts or omissions to include their agents or employees.
5. The Referrer agrees to non-circumvent the Company on any accounts submitted to the Company for placement by use of a Broker / Agent of Record letter or any other means and not seek direct appointment to surety used by Company for 6 mos. after placement.

### **Bond Cancellation**

The Company reserves the right to cancel, direct or decline to renew, any policy or bonds, at any time.

### **Termination**

1. Either party may terminate this agreement at any time upon written notice to the other.

### **Conditions**

1. Any Policy, Bond, Form, Application or Manual, Powers of Attorney, Seal or other records furnished by the Company for use of the Referrer shall remain property of the Company and shall be returned to the Company on demand or upon termination of this Agreement. All such documents shall be returned to the Company within ten (10) working days.
2. This Agreement supersedes all previous agreements whether written or oral between the Company and the Referrer and shall be effective on the date it is signed, and shall remain in full force and effect until it is suspended, superseded or terminated as provided herein.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date