



## CoverageFirst Sub-broker Registration Guide

Step1: Go to <https://www.coveragefirst.com/> and complete the form (screen shot example below) and click Submit. You will receive an email within 48 business hours asking you to log in and complete the registration.

The screenshot shows the 'Register your account' section of the CoverageFirst website. The browser address bar shows 'https://app.coveragefirst.com/'. The page title is 'CoverageFirst' and there is a 'LOGIN' button in the top right. The main heading is 'Register your account'. Below the heading is a paragraph explaining the registration process. The form fields include: Email, Password (with a note: 'Password must contain at least six characters and at least one non-alphanumeric special character.'), Confirm Password, Full Name, Agency Name, Agency DBA, Tax Payer ID, and Legal Entity (a dropdown menu). Below the form is the 'Your Agency' section with question 1: 'How many producers are there in your agency?' and an input field.

The screenshot shows the 'Your Agency' and 'Addresses' sections of the CoverageFirst registration form. Question 3: 'Are you, as an agent, indebted to any insurance company, general agent, manager, or broker, or are any of the same claiming that you are indebted to them?' has radio buttons for Yes and No. Question 4: 'Have you filed for bankruptcy, court protection, or reorganization during the past five years, or is any bankruptcy proceeding filed by you still pending?' has radio buttons for Yes and No. Question 5: 'Have you ever been convicted of a felony or disciplined, fined, or censured by a state insurance department or any regulatory body or court?' has radio buttons for Yes and No. Question 6: 'Are you now the subject of any complaint, investigation, or proceeding that could result in a yes answer to any of the previous questions?' has radio buttons for Yes and No. The 'Addresses' section includes a dropdown for 'Address Type', input fields for 'Street', 'City', 'State' (dropdown), 'Zip Code', 'Suite', 'Phone Number Type' (dropdown), 'Phone Number', and 'Extension'. There are 'REMOVE ADDRESS' and 'ADD ADDRESS' buttons. Below the addresses is the section 'I am interested in the following niche markets:' with checkboxes for 'National Hangar Insurance Program', 'StorageFirst', 'CharityFirst', 'State Fund First', and 'OnTheMark WorkComp'. The 'Primary contact that referred you' section has an input field. The 'Comments' section has a large text area. At the bottom are 'SUBMIT' and 'Cancel' buttons.



Step 2: Once you have logged in, go to the Required Documentation section. Complete all 3 sections, Broker Agreement, Licenses, and E&O. You have the option to upload your Resident Insurance License and E&O dec page or certificate directly to the site instead of emailing or faxing it to us. Once all 3 sections are complete click Save Registration.

The screenshot shows a web browser window with the URL <https://app.coveragefirst.com/#/Dashboard/Licenses>. The page header includes the CoverageFirst logo and a "LOG OUT" button. The main content area displays a welcome message for Genny Williams and a notification that the registration for 427 CF Test 1 Agency is in the Pending Agreement state. It instructs the user to complete three sections: Broker Agreement, Licenses, and E&O. Below this, a navigation bar shows "Edit Registration", "Required Documentation", and "User Management". The "Required Documentation" section is active, showing the "427 CF Test 1 Agency" page. Under the "Broker Agreement" heading, there is a "CLICK HERE" button to download the document. A preview of the "CoverageFirst Broker Agreement V2" is shown, detailing the terms of the agreement between Arthur J. Gallagher Risk Management Services, Inc. and the agency. The agreement includes terms for coverage, duration, termination, and the user's authorization to submit applications.

**Welcome Genny Williams!**  
Your registration for 427 CF Test 1 Agency is currently in the Pending Agreement state  
Please complete all 3 sections in the "Required Documents" tab for your registration to be submitted for Approval. Click on each section for further instructions. You will know you are done when a check mark appears on each of the 3 sections below. When you are done you will receive a response within 48 business hours letting you know if your registration has been Approved.

Edit Registration Required Documentation User Management

### 427 CF Test 1 Agency

#### Broker Agreement

[CLICK HERE](#) to download your broker agreement document.

CoverageFirst Broker Agreement V2

**BROKER AGREEMENT**

This agreement is made between **ARTHUR J. GALLAGHER RISK MANAGEMENT SERVICES, INC.** of Two Pierce Place, Itasca, IL, 60143, dba Coverage First (we, us, our) and **427 CF Test 1 Agency** at 100 Main, Tulsa, Oklahoma, OK 74112

It is agreed that:

1. All business you place with us will be covered by this Agreement.
2. This Agreement will be in effect for one year from the date set out below, and after that will automatically renew for additional one year terms until terminated by either party on thirty days notice.
3. This Agreement automatically terminates without notice if:
  - A. You lose your license to engage in the business of insurance;
  - B. You engage in fraudulent or otherwise illegal activities of any kind involving the business of insurance; or
  - C. You fail to timely pay us any premium when due.
4. We authorize you to submit applications for all the lines of property and casualty insurance posted on our website at coveragefirst.com, on a non-exclusive basis and at the commission rates so indicated. We may revise the insurance coverages offered and commissions posted on our website from time to time. In doing so, we otherwise agree in writing, you have no authority to bind coverage on behalf of us or any insurance company we

Agree to the above broker agreement



https://app.coveragefirst.com/#/Dashboard/Licenses

CoverageFirst

LOG OUT

**Welcome Genny Williams!**  
Your registration for 427 CF Test 1 Agency is currently in the PendingAgreement state

Please complete all 3 sections in the "Required Documents" tab for your registration to be submitted for Approval. Click on each section for further instructions. You will know you are done when a check mark appears on each of the 3 sections below. When you are done you will receive a response within 48 business hours letting you know if your registration has been Approved.

Edit Registration Required Documentation User Management

427 CF Test 1 Agency

Broker Agreement

Licenses

Please upload a copy of your license after you have entered the information in the required fields. You may also email your license to us as a reply to the registration email you received or fax it to 918-585-1883.

Drag file here No file chosen Choose File

License Number  State  Expiration Date   Resident State Agent or Agency Insurance License

UPLOAD DOCUMENT

E & O Certificate or Declarations Page

SAVE REGISTRATION

https://app.coveragefirst.com/#/Dashboard/Licenses

CoverageFirst

LOG OUT

**Welcome Genny Williams!**  
Your registration for 427 CF Test 1 Agency is currently in the PendingAgreement state

Please complete all 3 sections in the "Required Documents" tab for your registration to be submitted for Approval. Click on each section for further instructions. You will know you are done when a check mark appears on each of the 3 sections below. When you are done you will receive a response within 48 business hours letting you know if your registration has been Approved.

Edit Registration Required Documentation User Management

427 CF Test 1 Agency

Broker Agreement

Licenses

E & O Certificate or Declarations Page

Please upload a copy of your E&O dec page or certificate after you have entered the information in the required fields. Make sure that the document includes the agency name that you are registering under, the policy number, the expirations date, and the limits. You may also email your E&O to us as a reply to the registration email you received or fax it to 918-585-1883.

Drag file here No file chosen Choose File

E & O Policy Number  Limit  Policy Expiration Date

UPLOAD DOCUMENT

SAVE REGISTRATION

Step 3: After your registration is saved it will be reviewed and you will receive an email confirmation either asking for more information or letting you know your registration has been Approved.

Please email [cinfo@coveragefirst.com](mailto:cinfo@coveragefirst.com) or call 1-888-650-2685 with any questions.