



SW/Risk Producer Portal

New Agent Appointment Process



New Agent Appointment Process Overview



SW/Risk has revamped its online producer appointment process. The new process is broken down into 3 steps. The agent can stop between steps and comeback to complete.

3 Steps to complete

- Basic Agency Information
- Agency Profile
- Document Uploads

There is a Help button in the upper right corner that will allow the agent to contact the compliance team directly. Please use it for any questions about the information requested as well as if the person runs into a technical issue and needs help.

<https://producer.clearviewrisk.com/>

New Agent Appointment – Basic Info



https://producer.clearviewrisk.com/Producer/Create

Qlik Dash NEW - Home - Rep... Qlik -QMC Strata RiskFlow Strata ClaimsFlow QuickPay LIVE site Home Page - Quick... DEV_Reports - SQL... Log in - Strata Access Stratasphere QlikFlow Budgeting

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15 Min Monoline Cyber Liability Quotes
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Hello jay.trivedi@amyntagroup.com! Logout Help

Agency Information

Agency Name	Legal Name	Principal / Owner Name
<input type="checkbox"/> Taxable?	<input type="checkbox"/> 1099 Required	Tax ID
Agency Website Address		

Phone, Fax, Email Addresses

Agency	Agency Phone #	Agency Fax	Agency Email Address jay.trivedi@amyntagroup.com
Principal / Owner	Principal / Owner Phone #	Principal / Owner Fax	Principal / Owner Email Address
Accounting	Accounting Phone #	Accounting Fax	Accounting Email Address jay.trivedi@amyntagroup.com

Agency Physical Address

Physical Address			
City	County	State	Zip Code

Principal / Owner Address Same As Physical Address

Mailing Address Same As Physical Address

Accounting Address Same As Mailing Address

Download the agreement, the button will change to Create Profile. Click it again to proceed.

[Download Agreement](#)

Agents Info:

This is the Agency's information.

Phone/Fax/Email:

General Agency, Principal, and Accounting info.

Addresses:

The Physical Address must be filled out, if there are different addresses for the Principal, Mailing or Accounting those can be entered by unchecking the 'Same as...' boxes.

New Agent Appointment – Producer Profile



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PA-4294 Test Agency 123 Pending Approval

Contact Info Profile

Producer Profile

of Employees (excluding principals and producers) 25
of Licensed Producers 10
SWRisk Broker Dipo Alli
Primary Financial Institution Bank of England

Describe Specialty in Any Areas
Property and Casualty Focusing on Investor RE

Additional Branch Addresses:

#	Address	Address Line 2	City	State	Zip	
1	2525 Main Street		Fort Worth	TX	76137	Insert

Breakdown of Agency Written Premium:

Commercial Lines \$2,500,000
Personal Lines \$4,000,000
Life & Health \$453,000
Other Amount

Total Agency P&C Premium Volume (Last Year Commercial Lines only):

Prior Year Premium \$6,500,000
Wholesale Percentage 30

Category	Property	Inland Marine	General Liability	Umbrella Liability
Admitted Markets (licensed)	\$2,000,000	\$0	\$1,000,000	\$1,000,000
Non-admitted Markets (approved)	\$500,000	\$500,000	\$500,000	\$500,000

Largest Insurance Companies Represented / Prior Year Premium:

#	Company Name	Prior Yr Premium	
1	Berkshire Hathaway	\$3,000,000	Insert

Wholesalers Contracted With / Prior Year Premium:

#	Wholesaler Name	Prior Yr Premium	
1	RT Specialty	\$1,500,000	Insert

Once you have verified all information and uploaded all relevant documents, please click Submit to let us know.

Save the Profile to Proceed

Save the profile, the button will move the user to the E&O and Document upload page.

Producer Profile:

This is the Agency's Employee count & Producer count.
Who is the SWR broker for this appointment.
Primary Bank for the Agency.
Agency's primary focus

Branch Offices:

Additional branch info.

Premium Info:

Breakdown of Premium by Lines.
Last full years Premium & split by Standard Vs Surplus Markets

Largest Carriers & Wholsalers:

List the top few for the agency.

New Agent Appointment – Document Uploads



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PA-4294 Test Agency 123 Pending Approval

Contact Info Profile **E&O / Licenses** Open Invoices Production Reports

Errors & Omissions

E&O Carrier
E&O Indemnity Company

E&O Policy #
123TEST

E&O Expiration
12/23/2024

E&O Limits
5000000

State Licenses

State	License #	Individual	Effective	Expiration	Type	Document	Actions
AL	AL456789	John Doe	01/01/2022	01/01/2026	Agent License	Upload	Update Remove
			mm/dd/yyyy	mm/dd/yyyy			Insert

Additional Documents

Producer Agreement - Upload Completed W-9 - Upload E&O Dec Page - Upload

Once you have verified all information and uploaded all relevant documents, please click Submit to let us know.

Submit

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Submit button will finalize complete the form. SW/Risk's Compliance team will notify the Broker when your appointment is completed.

E & O:

Agency's E & O Policy info.

State Licenses:

Agency and Individual License info, please upload a pdf copy per license.

Upload Additional Docs:

- Agency Signed Producer Agreement
- Completed W-9
- E&O Dec Page

The buttons will turn solid orange when uploaded.