



Safeco Book Transfer Options

Customizable Options

- Book transfer is not one-size fits all
- Qualifications and recommendations ensure a consultative approach to moving the book
- Ability to price match expiring auto/home premium on qualified books (Requires 3-year production review of book)
- Options Include:
 - Safeco owns all the quoting, customer contact and policy issuance
 - Blended model- Safeco quotes while agent owns customer contact and issuance
- Book Transfer New Business overrides up to 15% if started by February 1st, 2020
 - PL book must be over \$150,000 in written premium
 - Book must be profitable
 - Book transfer must maintain a premium conversion of 30% or higher

Transfer Options

Assumptive, Safeco Issues

- Safeco provides book transfer tracking code
- Safeco quotes policies
- Safeco manages all customer contact and notification
- Safeco sends postcard on behalf of the agency to notify the customer their policy will be quoted with Safeco
- Safeco issues quoted policies that match or beat expiring carrier premium
- Price matching available on qualified books

Blended Model, Agency Issues

- Safeco provides book transfer tracking code
- Safeco quotes policies
- Agency manages all customer contact and notifications
- Safeco sends postcard to notify the customer their policy will be quoted with another carrier
- Agency issues policies after customer contact
- Price matching available on qualified books

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