

How to Submit a Quote Request: Personal Lines

For carriers that are <u>not</u> directly accessible in the Agent Portal

To get a Personal Lines quote from a carrier that is not directly accessible through the Agent Portal (*for ex: Allstate, Chubb, Safeco, etc.*), you will need to complete our Personal Lines Submission Form. Once submitted, our Personal Lines Team will run the quote for you and send the results back via email.

To submit a Personal Lines request, please follow the steps below.

Screenshots for steps 1-4 are included at the end to help guide you:

- 1. Log in to the **Agent Portal** and locate the **Personal** section at the bottom.
- 2. Click on the **"Personal Lines Submission"** icon. You will be directed to a new page.
- 3. Click the **black hyperlink** to open the submission form.
- 4. Enter the **risk's information** into the form as accurate as possible.
 - If you are only wanting a quote from a specific carrier(s), please note the carrier's name in the **comments box** on the first page of the form.
- 5. Once submitted, you will receive a **confirmation email** that your request was received.
- Our Personal Lines Team will then review your submission, run the quote(s), and follow up via email with the best available option(s) and binding instructions.
 - **You may respond directly to their email** with any questions about your submission or the quotes provided.



INVO Personal Lines Submission

How It Works & Where to Submit

PLEASE READ BELOW BEFORE SUBMITTING:

The INVO Underwriting Personal Lines Submission form grants our agents the ability to submit a homeowners and/or auto submission directly into our team. Using this form streamlines the submission process which allows for us to get quotes out quicker.

When submitting through the form, please do the following:

Complete the information on behalf of the end insured.

Please **FULLY** complete the application process after starting to ensure your completed submission is received.

You will input your information as the agent on the final screen.

Start your submission here:

INVO Underwriting Personal Lines Submission

If you have any questions or need any assistance, please reach out to:

businessdevelopment@invounderwriting.com or 833-777-2453

	Getting Started		
	We follow the highest industry standards to safeguard the confidentiality of your perso	onal information and secure the transmission of	of your information from your compute
	Are you a Business? *	Ves 🖲 No	
	First Name *		
	Last Name *		
	Email *		What is this?
	Home Phone (e.g., 214-555-6677) *		
	Address *		Apt #
	City *		
	State *	select V Zip Code *	
	Line of Business *	⊖ Home ⊖ Auto ⊖ Home & Auto ⊖ Other	
<	Comments * required field	\bigcirc	