

(To Be on Client Letter Head)

(Sample)

Broker of Record Letter

Date

CDPHP

500 Patroon Creek Blvd

Albany, NY 12206

Group ID: \_\_\_\_\_

This is to notify you that our company has appointed (Name of Broker Agency) whose business address is (Street Address), as our sole insurance representative with respect to coverage provided o this organization by CDPHP® effective immediately.

[I have authorized (him/her) to act on behalf in place of (former broker name), whose business address is (street address).]\*

This letter also enables CDPHP to furnish (Name of Broker Agency) with all information they may request, as it pertains to our insurance contract. We also understand that (Name of Broker)'s broker commission will be paid out of our monthly premiums.

This designation will remain in effect until you are notified in writing to the contrary. We agree that any such notice shall apply prospectively to contract renewals.

Sincerely,

Signature

Name (Must be Group's Decision Contact)

Title of Company Official

\*Necessary if replacing former broker.