

# Client Portal Pre-Registration

## Company Details

Company Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Administrators

*Administrators can manage other users - invite new users, activate/deactivate and change permissions.*

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Email: \_\_\_\_\_

### Users

*Default access allows user to request policy changes, add documents, add holders, as well as view policies, auto id cards, documents and certificates.*

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Email: \_\_\_\_\_

### Document Delivery

- Policy Documents
- Certificate of Liability Insurance
- Evidence of Property Insurance (EPI)
- Auto ID Cards

### Capabilities

- Request policy changes
- Find links to carrier websites
- Share large files with our team
- Access direct claim reporting details

### Delivery Consent

By signing this form, you are providing Assurance Partners with consent to provide documents to you electronically on behalf of our agency, the insurance companies represented by the agency and other third parties. All documents sent by our agency to you are subject to this consent. You are not required to receive documents electronically. When the agency delivers a document electronically, it will do so by making the document available to you through an online customer portal where documents are placed for you to view or by sending the documents by e-mail.

To access documents, you will need an e-mail address, Adobe Acrobat Reader and a computer or other personal device that is capable of accessing the internet. You may withdraw your consent to receive documents electronically, at any time and without charge, by sending an e-mail request to [service@yourassurance.com](mailto:service@yourassurance.com) or a written request to Assurance Partners, 201 E. Iron, Salina, KS 67401.

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature