



CAIS Independent New Agency Signup - DocuSign Process

12/16/20

1. Visit Join Page of CAISlive.com <https://www.caislive.com/join>
2. Click on the link for **Independent New Producer Kit** to begin process.
3. Fill in the top portion under Agency, include Your Name and Your Email address. Click BEGIN SIGNING.

PowerForm Signer Information
Please fill out the Agency section only. Other sections have been prefilled by CAIS. Then press the BEGIN SIGNING button.
Please enter your name and email to begin the signing process.

Agency

Your Name: *
Full Name

Your Email: *
Email Address

Please provide information for any other signers needed for this document.

Sales

Name:
Gary Deck

BEGIN SIGNING

4. Accept the request for DocuSign to know your location.
5. Click the box to agree to use Electronic records and signatures.

Please Review & Act on These Documents

Melanie Pearson
Community Association Insurance Solutions, LLC

Please read the [Electronic Record and Signature Disclosure](#).
 I agree to use electronic records and signatures.

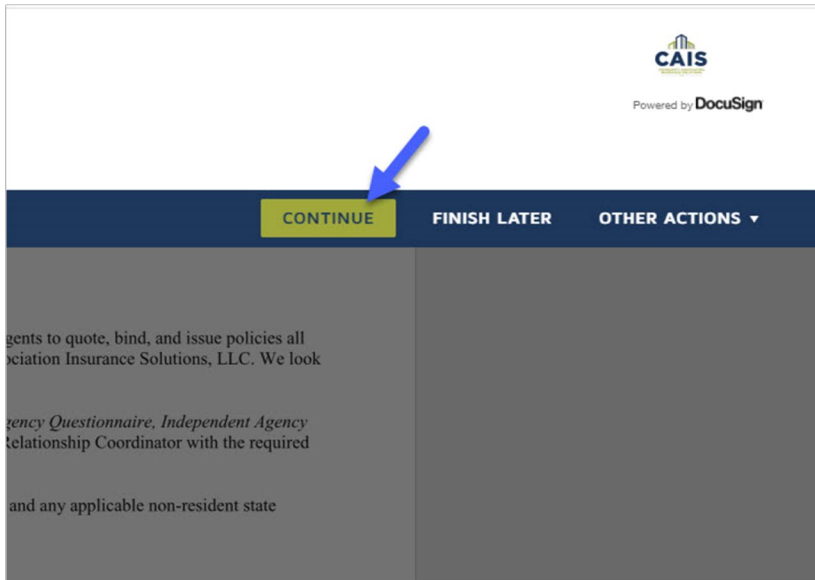
Welcome to MGALive.com

MGALive.com is an automated transaction portal all online. MGALive.com is brought to you by Community Association Insurance Solutions, LLC. We look forward to working with you!

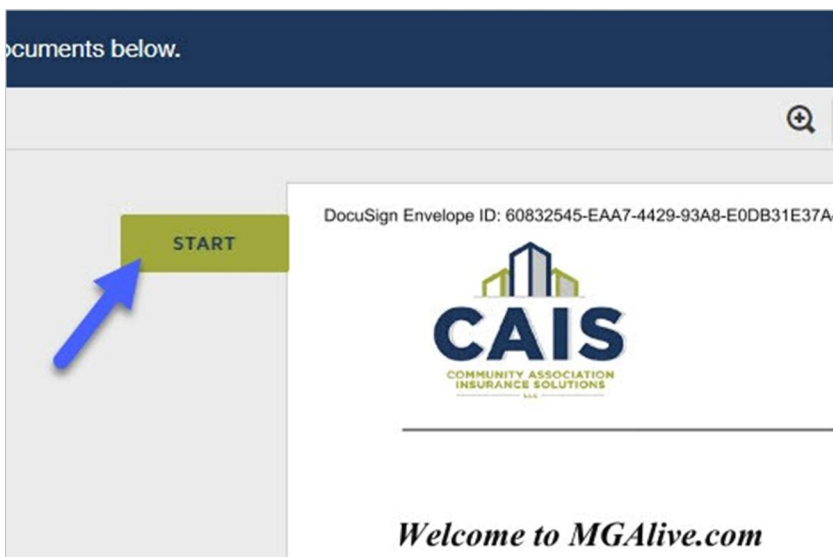
To sign up with us, please complete and sign the attached *Producer Agreement, and W-9*. Please send the following documents:

- ◆ Your Agency resident state insurance licenses.
- ◆ Current E&O policy declaration page
- ◆ Your broker bond (if required by you)

6. Click continue.

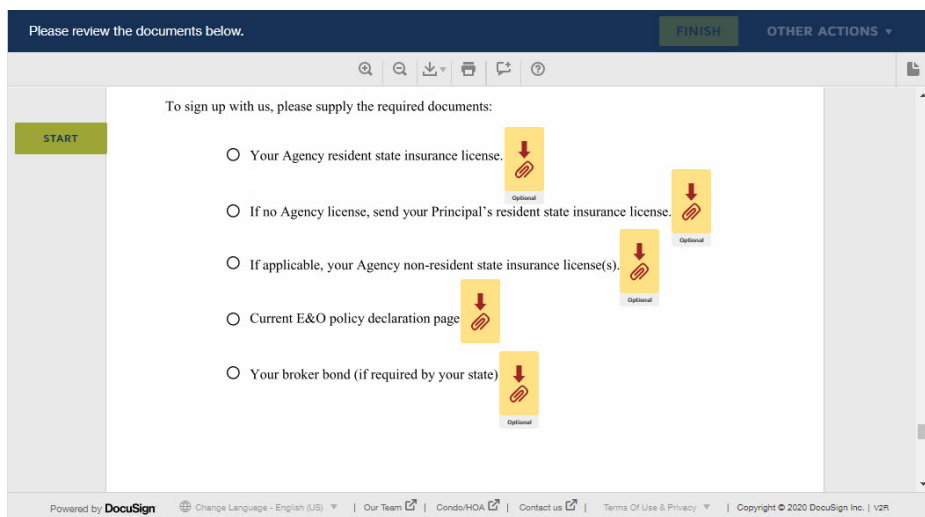


7. Click START and follow the green NEXT icon through the required form fields.



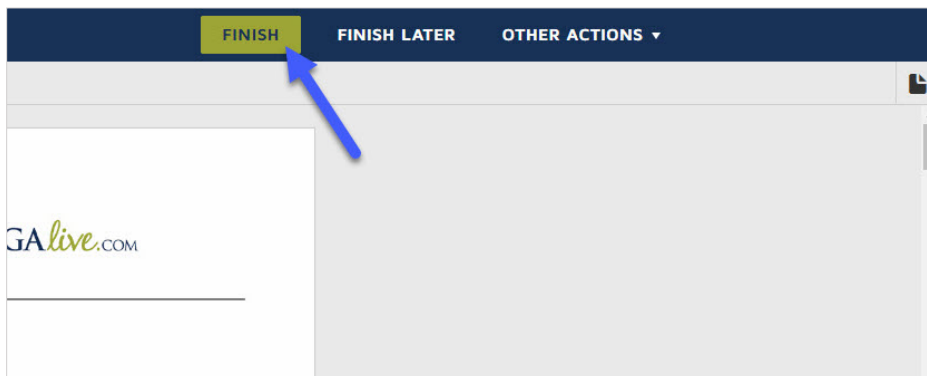
8. Upload your required documents (license, E&O, etc).

- Copy of resident insurance **license** (JPEG or PDF file)
- Copy of out of state licenses can be provided later
- Current **E&O policy declaration page or certificate** (JPEG or PDF file)
- Copy of your broker bond (if required by your home state, JPEG or PDF file)



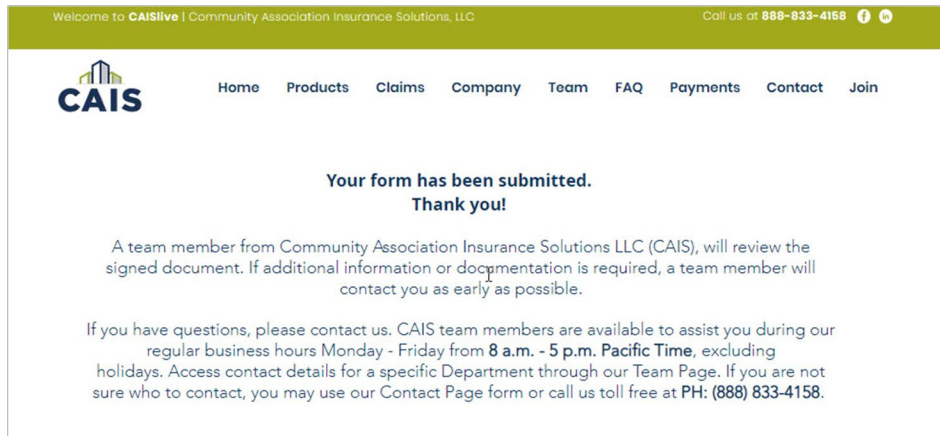
9. Fill out the W9 form. In the **TIN** section enter either your **EIN** or **SSN** and sign.

10. Click the FINISH button.





11. You will be redirected to the page: **Your form has been submitted.**



An automated email sent from DocuSign will provide a copy of the electronic completed Independent New Producer Kit. Your application packet will be reviewed, and you will receive a Welcome letter email with your User Name and Password from our Relationship Coordinator. The review process takes approximately 24-72 business hours.

If you would like to review the document prior to filling out the contract, you may contact CAIS for a PDF version. Please direct any questions to:

Contact: Relationship Coordinator
Email: contracts@mgalive.com
Phone: 888.833.4158