RLI Personal Umbrella eSign & Online Payment

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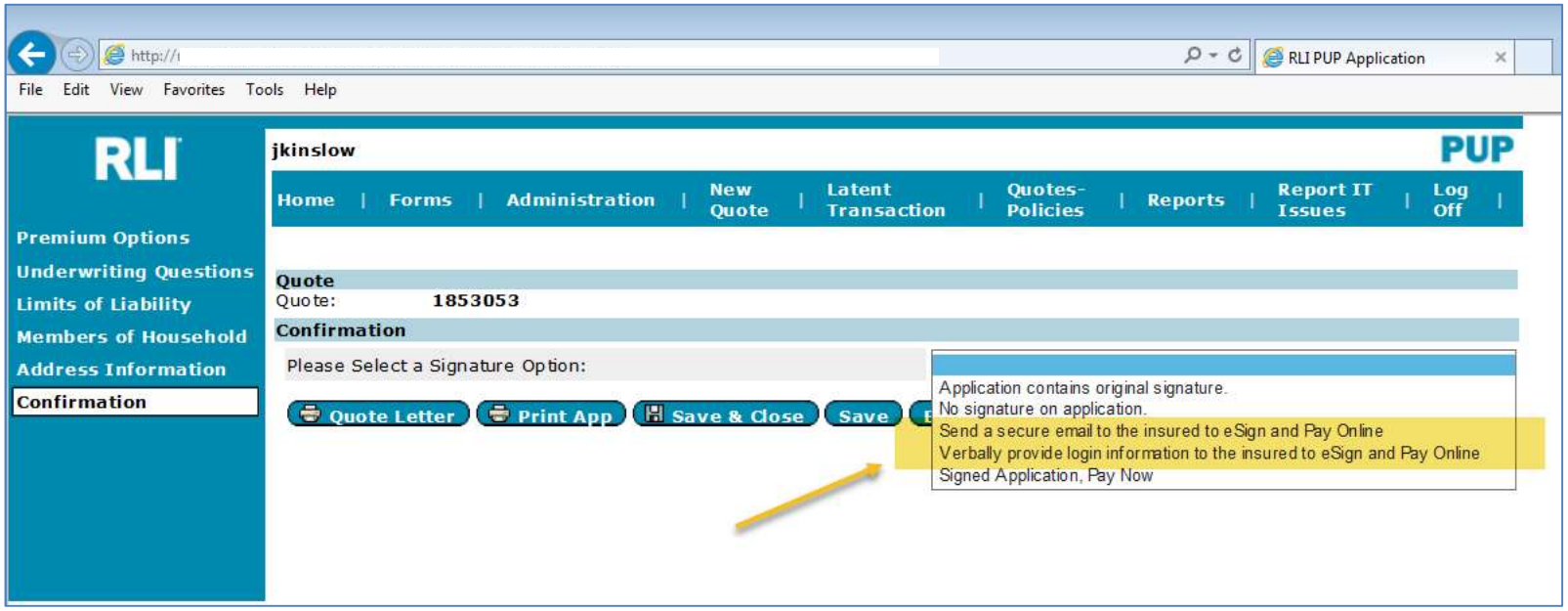
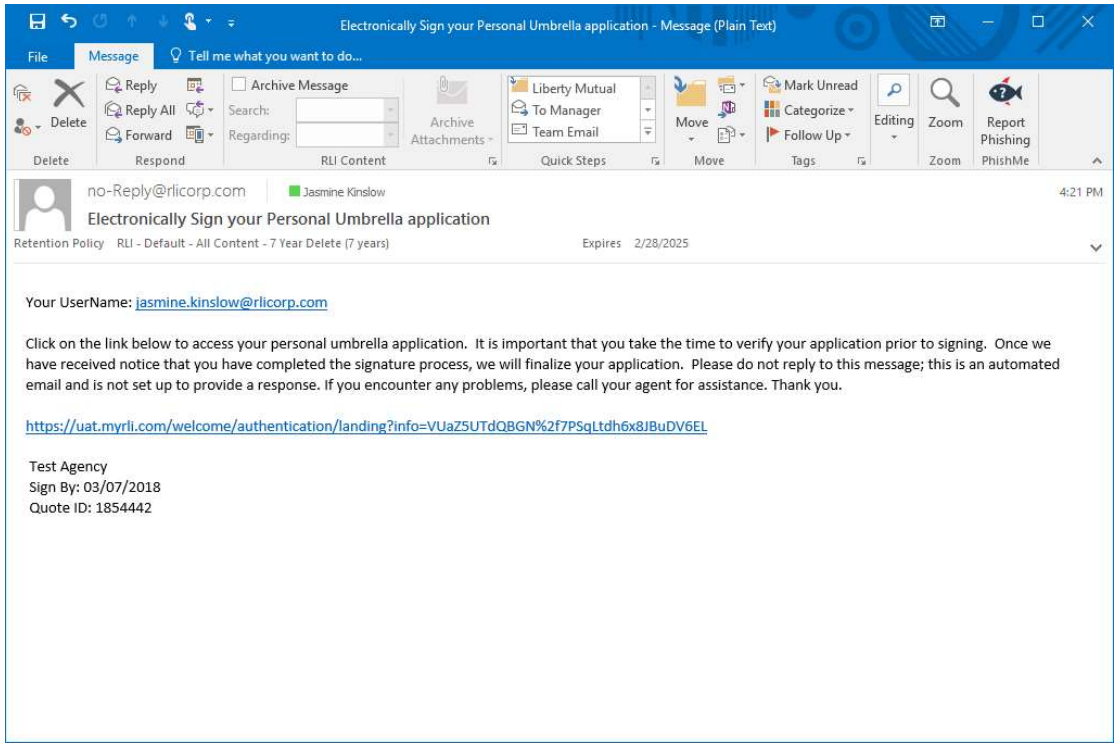
DIFFERENT WORKS

Begin the eSign and Online Payment Process Here



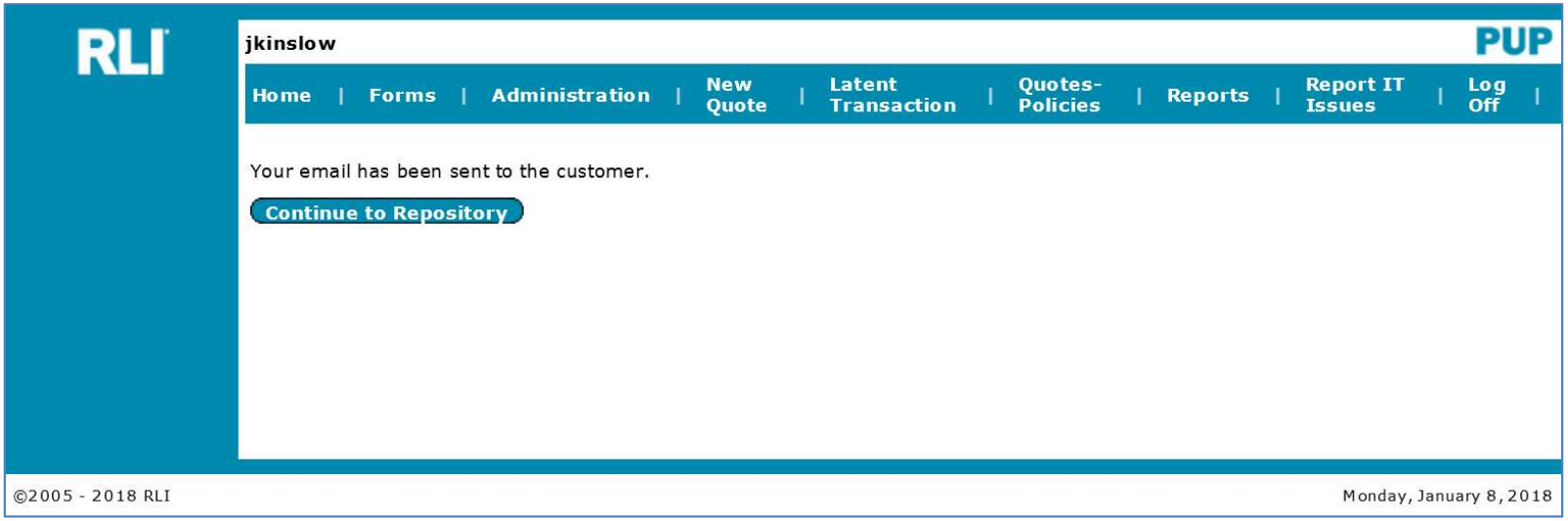
OPTION 1: Send a secure email to the Insured to eSign and Pay Online

This is a copy of the e-mail your **Insured** will receive. The **Insured** has 5 days to complete the eSign and Electronic Payment. The Insured opens the email, and then clicks on the secure link to enter RLI's eSign and online payment process.



OPTION 1: Send a secure email to the Insured to eSign and Pay Online

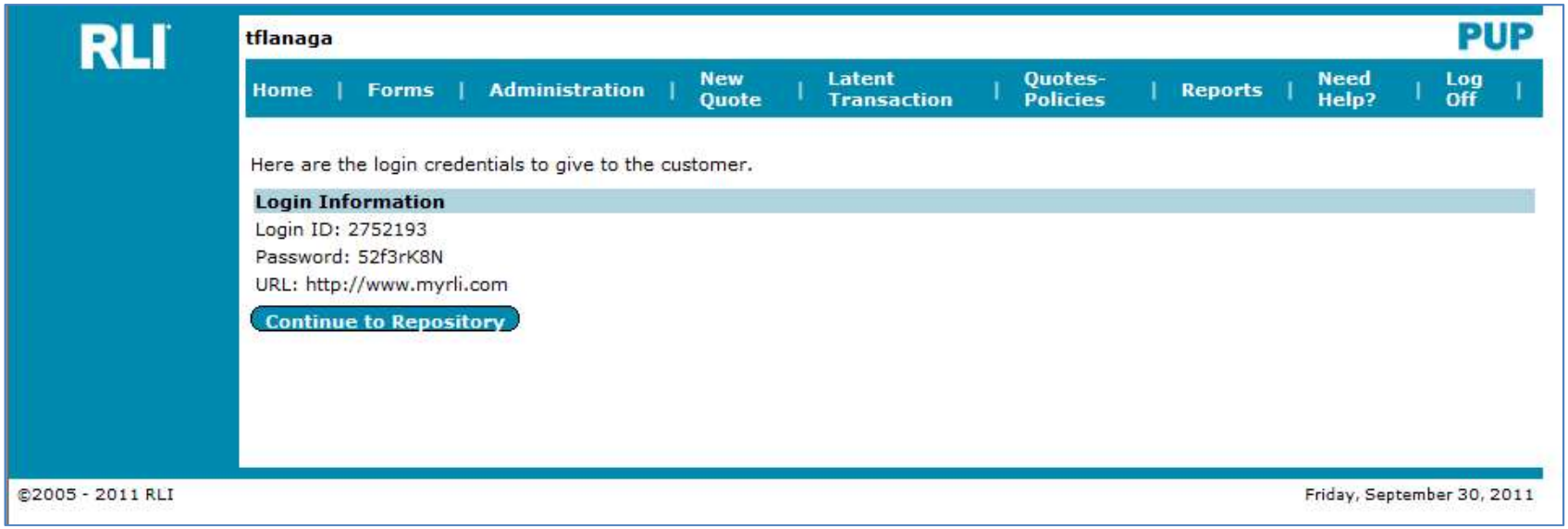
This is a copy of the PUP Access system screen you will see after the email has been sent to your customer.



OPTION 2: Verbally provide login information to the Insured to eSign and Pay Online

This is the screen that will be displayed to the **Agent** if the "Verbal" option is chosen, so that the **Agent** can provide the Login ID, Password, and Website address to the Insured.

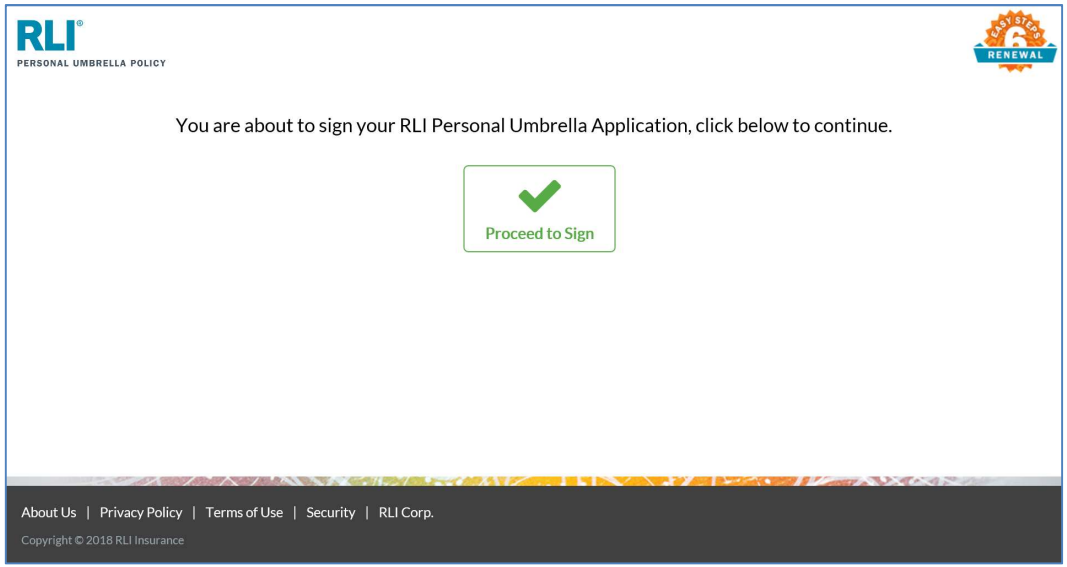
The Insured then logs onto www.myrli.com to continue the eSign and online payment process.



eSign Instructions

For insured's who chose the "**Send a secure email to the Insured to eSign and Pay Online**" option, clicking on the link in the email will take them to this landing page.

The insured will click "Proceed to Sign" to proceed to the first page of the electronic signature and online payment process.



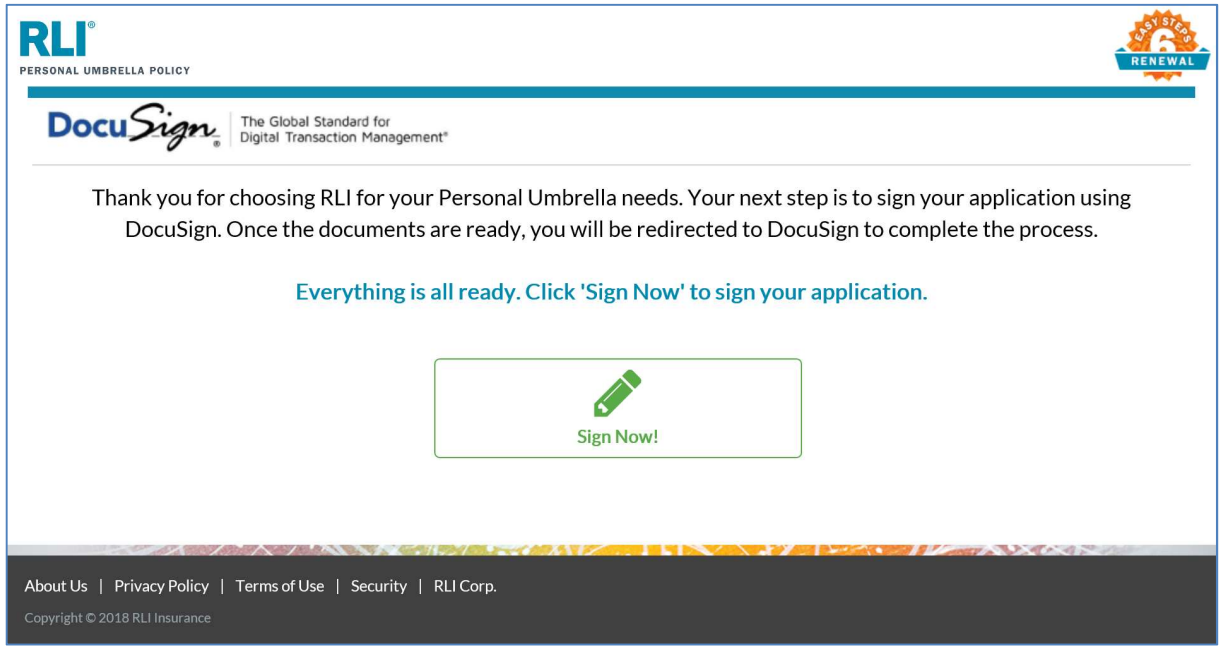
eSign Instructions

This is the first page of the electronic signature and online payment process. From here, all insured's will follow the same steps.

For insured's clicking the link in the email, this screen follows their landing page.

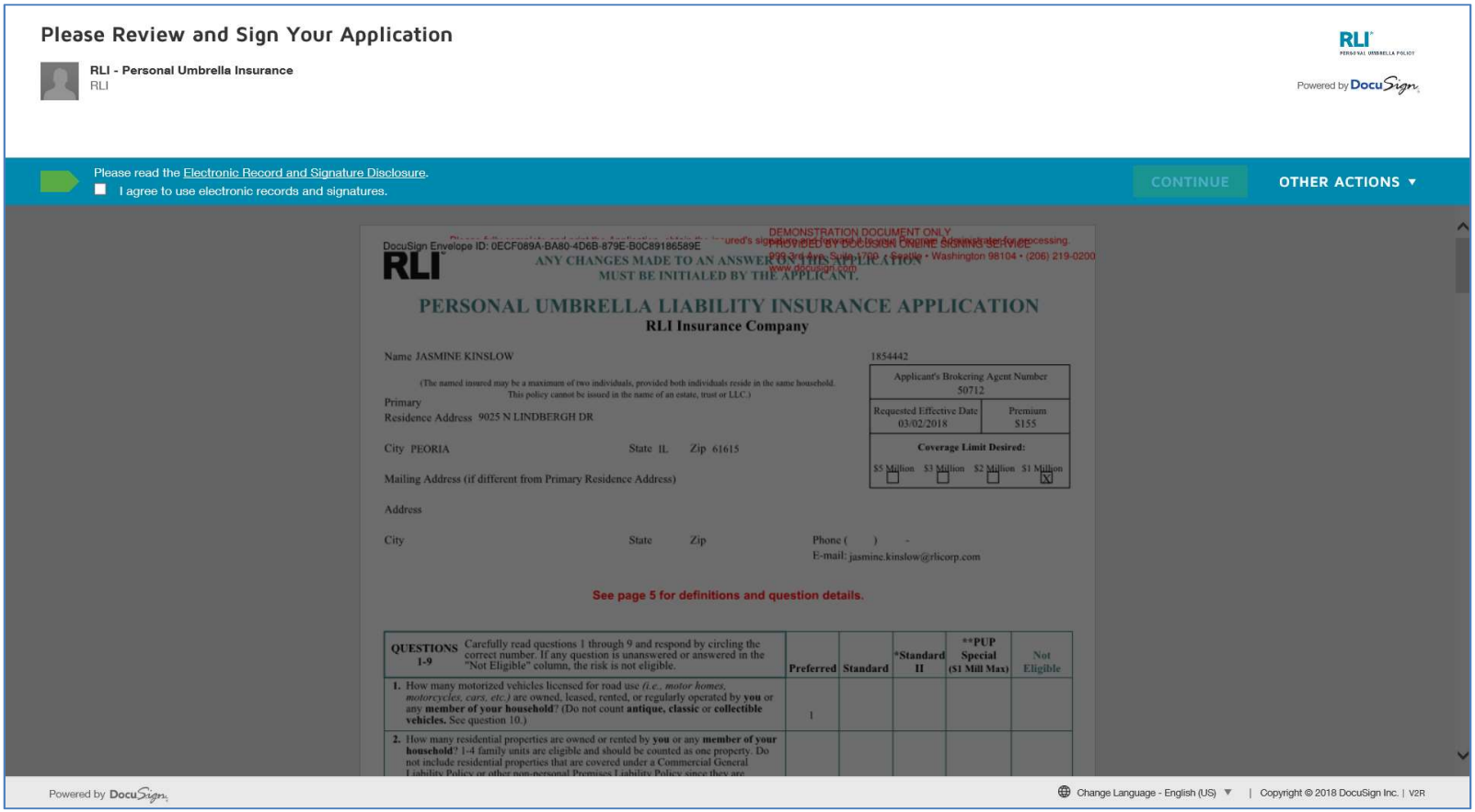
For insured's logging in through the www.myrli.com website, they will proceed directly to this page.

Click on the "Sign Now!" button to load the application.



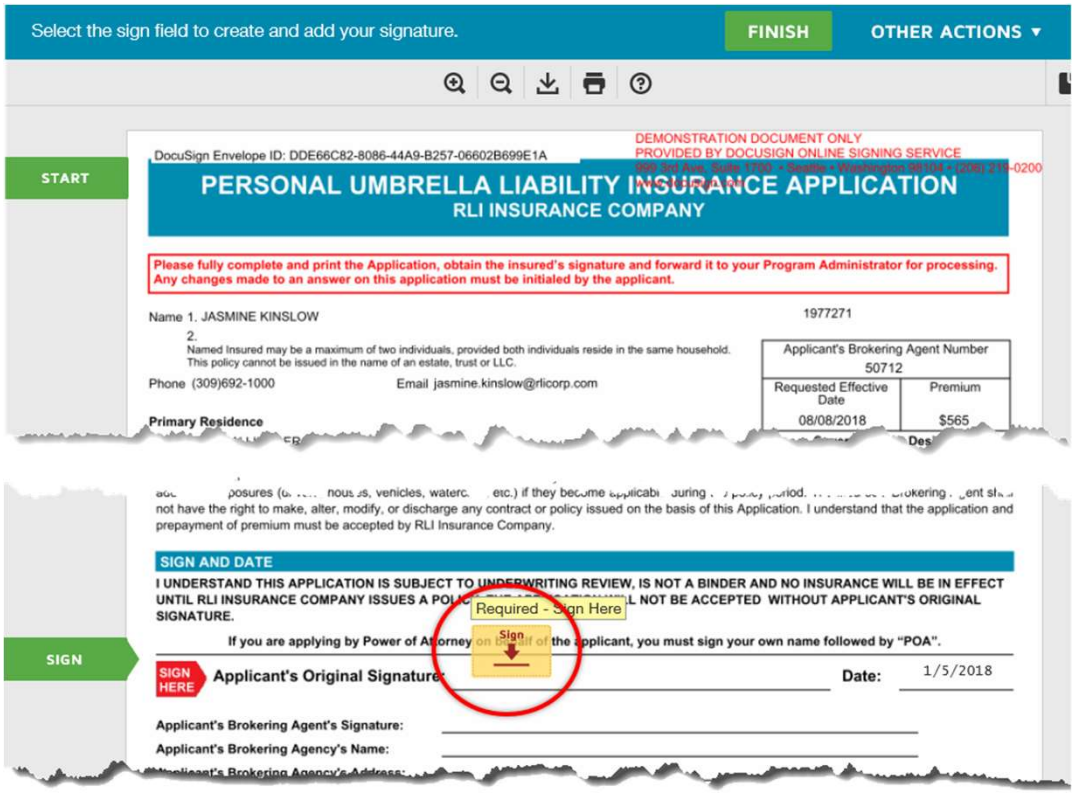
eSign Instructions

The insured will need to read the Electronic Record and Signature Disclosure and then check the box to agree to use electronic records and signatures and click continue.



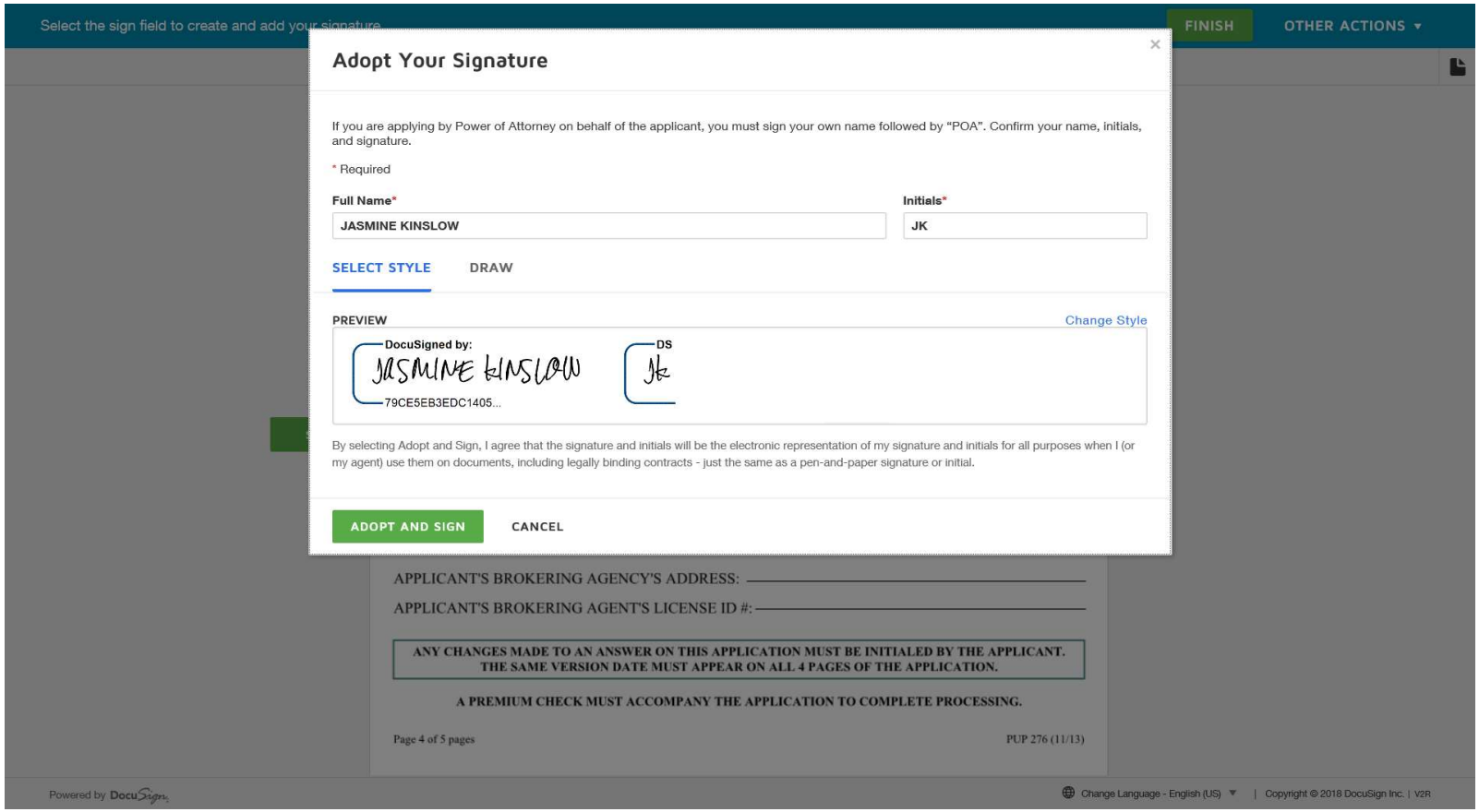
eSign Instructions

The insured will then scroll down, reviewing the application answers. Once at the signature location the insured will click on the orange “Sign” box to create their electronic signature.



eSign Instructions

The insured will type their full name and initials in the appropriate boxes and a signature will generate in the preview box. Then to continue, select “ADOPT AND SIGN”.



eSign Instructions

Once the insured has reviewed and electronically signed the application, the insured must select “FINISH” to complete the eSign process and begin the Online Payment process.

Done! Select Finish to send the completed document. FINISH OTHER ACTIONS

IMPORTANT NOTICE REGARDING THE FAIR CREDIT REPORTING ACT: I understand that as a part of the underwriting procedure, a consumer report may be obtained or an investigative consumer report may be prepared. Such reports may include information regarding my driving record, credit history, general reputation, personal characteristics and mode of living. I hereby consent to the preparation of such reports and the disclosure of such reports to RLI Insurance Company and the producer of record. I understand that these reports will be handled in the strictest confidence, and that information as to the nature and the scope of these reports will be provided to me upon request.

FRAUD WARNING: Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false, incomplete, or misleading information, or conceals information concerning any material fact thereto, commits a fraudulent insurance act, which is a crime punishable by incarceration, and shall also be subject to civil penalties.

APPLICANT STATEMENT: The information given on this application is true and complete to the best of my knowledge. I understand that any omission or misstatement of fact in the information given voids the policy. I agree that I will acquire and maintain Minimum Required Limits of Liability for all additional exposures (drivers, houses, vehicles, watercraft, etc.) if they become applicable during the policy period. The insured's Brokering Agent shall not have the right to make, alter, modify, or discharge any contract or policy issued on the basis of this Application. I understand that the application and prepayment of premium must be accepted by RLI Insurance Company.

I UNDERSTAND THIS APPLICATION IS SUBJECT TO UNDERWRITING REVIEW, IS NOT A BINDER and NO INSURANCE WILL BE IN EFFECT UNTIL RLI INSURANCE COMPANY ISSUES A POLICY. THE APPLICATION WILL NOT BE ACCEPTED WITHOUT APPLICANT'S ORIGINAL SIGNATURE. A Power of Attorney letter must accompany the application, where applicable.

DATE 3/2/2018 **APPLICANT'S ORIGINAL SIGNATURE:** DocuSigned by: JASMINE LINSLAW 79CE5E83EDC1405...

(FL Requirement: This application is in compliance with Section 626.752, Florida Statutes. A copy has been furnished to the applicant and coverage is Not Bound.)

APPLICANT'S BROKERING AGENT'S SIGNATURE: _____

APPLICANT'S BROKERING AGENCY'S NAME: _____

APPLICANT'S BROKERING AGENCY'S ADDRESS: _____

APPLICANT'S BROKERING AGENT'S LICENSE ID #: _____

ANY CHANGES MADE TO AN ANSWER ON THIS APPLICATION MUST BE INITIALED BY THE APPLICANT. THE SAME VERSION DATE MUST APPEAR ON ALL 4 PAGES OF THE APPLICATION.

A PREMIUM CHECK MUST ACCOMPANY THE APPLICATION TO COMPLETE PROCESSING.

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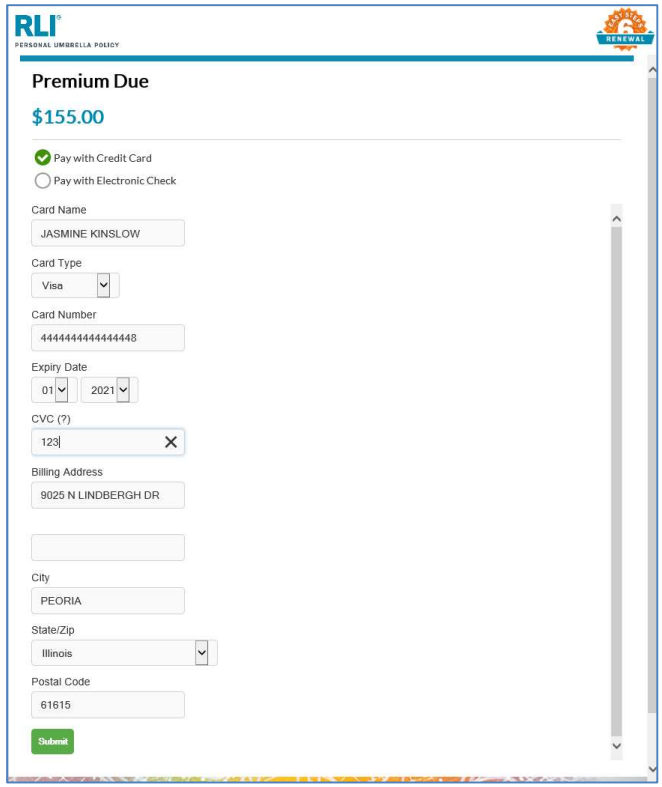
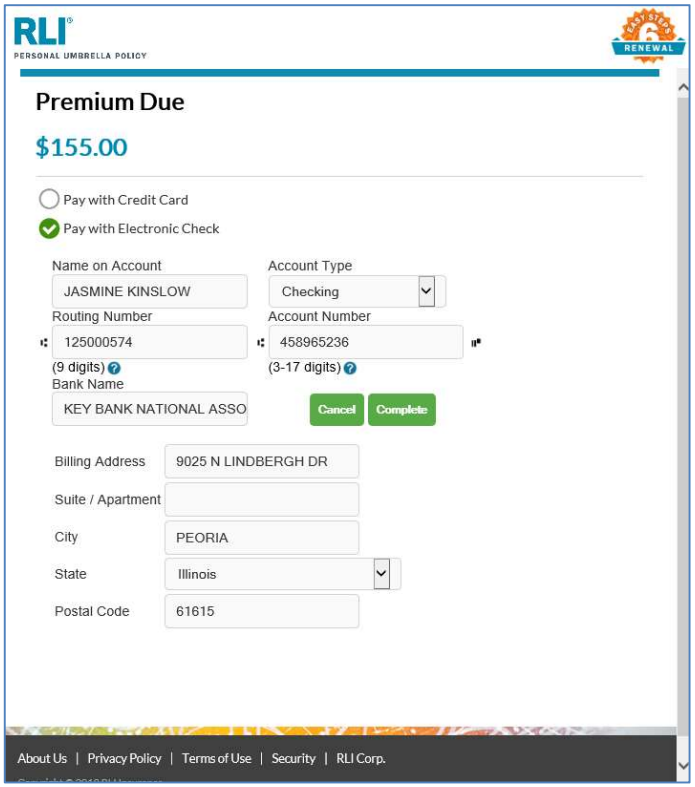
Online Payment Options

Here is where the Insured will determine how to pay for the policy. This can be set up as: 1) a **Credit/Debit** card payment, or 2) the funds can be withdrawn from a checking or savings account (**Electronic Check**). Select the payment method and fill in the required payment information. Then select "Submit" to complete the transaction.





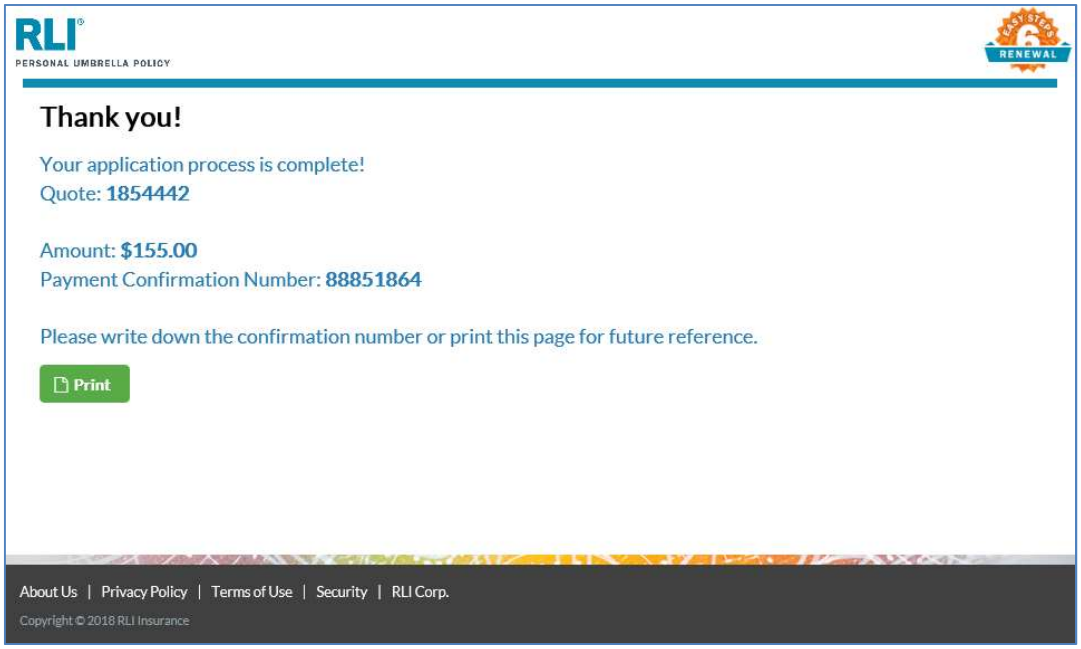
Transaction Status – On Screen Notice

When the payment has been submitted, the **Insured** will receive notice that the application process is complete on screen and also via email (see next slide).

Please note:

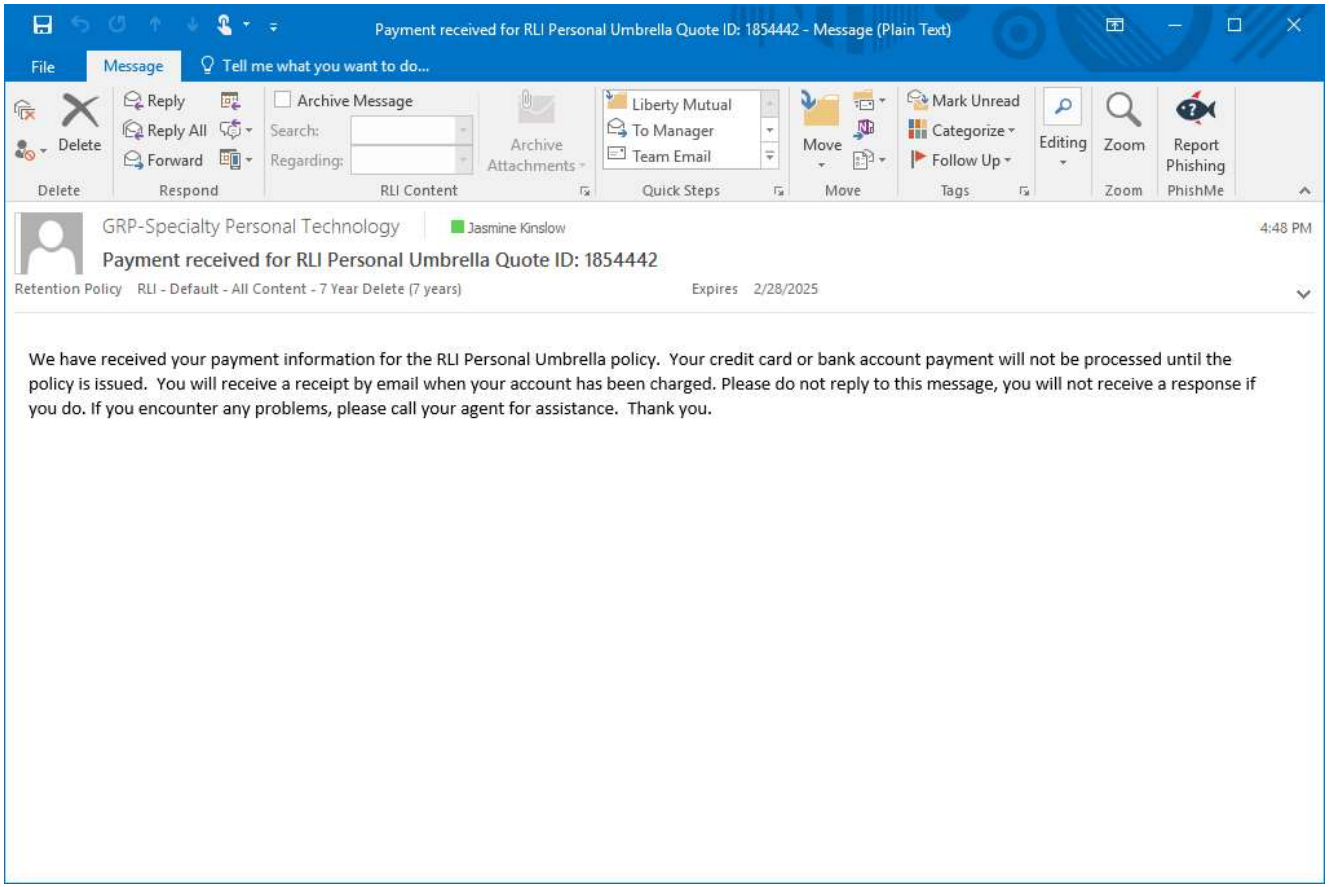
This payment may take *at least* one business day to appear in the Insured's credit card or bank account.

Payment status of the quote will change in PUP Access within 15 minutes.



Transaction Status – Emailed to Insured

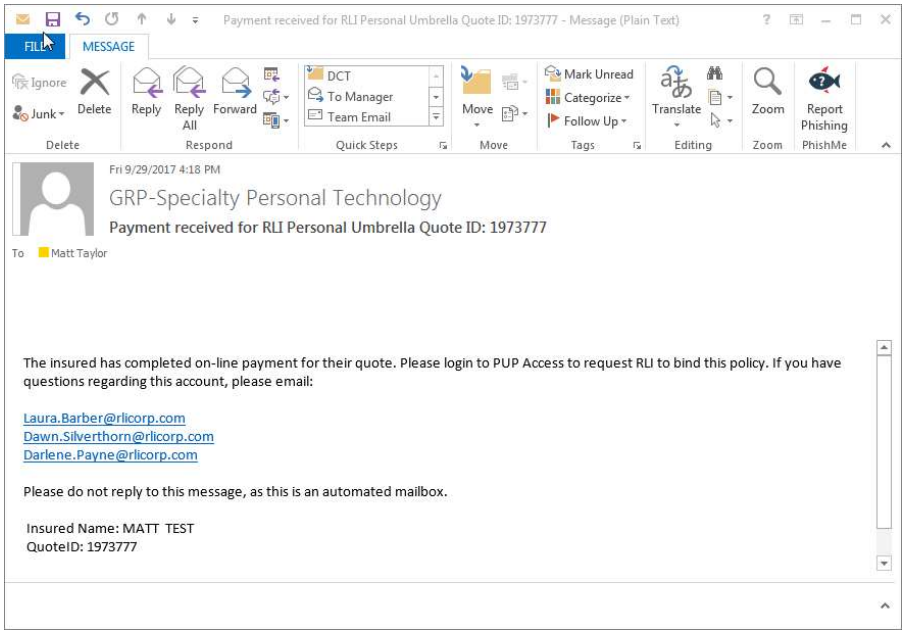
After the payment has been submitted, the **Insured** will receive an email with the receipt of authorization.



Administrator Alert E-mail

Once the Insured has completed the eSign and payment process, this e-mail will be sent to the **Administrator** as an alert to retrieve the quote and bind it to RLI. **This e-mail will be sent to the email address on record as the Main Contact for RLI.**

Note to Administrator: There is no indication sent to the sub-producer once the process has been completed. The administrator will receive this email approximately 15 minutes after the insured completes the eSign and payment process.



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