

# A Simple Move

## WESTFIELD TRANSFER BOOKS

With Westfield, transfer books are fast, easy and trouble-free. Our dedicated transfer book team makes the process simple so you and your customers can reap the many rewards.

Make the first move. Contact your underwriter or our dedicated transfer team at [TransferTeam@Westfieldgrp.com](mailto:TransferTeam@Westfieldgrp.com).

# Farm and Agribusiness

▶ Cultivate growth with Westfield transfer books

"Westfield's transfer book team more than met our expectations. The entire process was well communicated and went very smoothly. The underwriters and processors are professional, friendly, and quite knowledgeable. They made the transfer easy for us."

— Agency Principal, IN

With some carriers, book transfers can be complex and confusing. That's why we've made it a high priority to streamline the process and make sure you have our expert transfer book team with you every step of the way.

- 1 Make the first move**  
Simply contact your small farm underwriter or region leader and let them know you are interested.
- 2 Let's meet**  
Our transfer book team sets up a meeting to discuss our process and answer questions.
- 3 Evaluate for success**  
We evaluate your five-year production records and policy listing to determine a plan that works for you.
- 4 Analysis for alignment**  
Our team discusses any potential accounts in question.
- 5 Quote samples for pricing**  
We are happy to provide the option of test quotes for pricing analysis.
- 6 Timeline that works for you**  
Together, we pick a start date and begin the rollover.
- 7 We keep you updated**  
Quarterly updates keep you informed of progress.
- 8 End game**  
The transfer process is complete within 12 months (or longer only if agreed upon).



# Small Business

▶ **We're with you every step of the way**

"The Transfer Book Team at Westfield has been extremely helpful and accommodating to our book transfer requests and needs. The team has done a great job at making the book transfer a seamless and positive experience for our agency and our clients."

— *Agency Principal, Cincinnati, OH*

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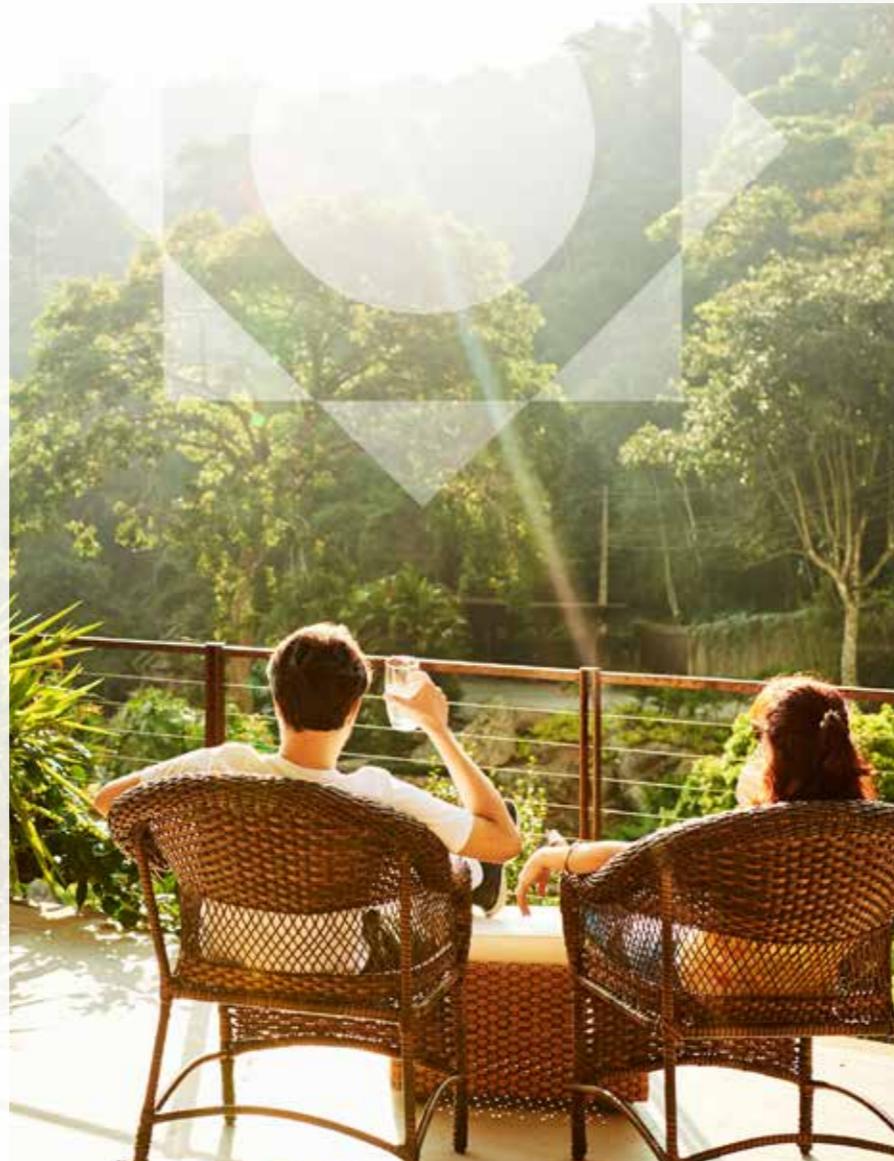
- 1 Make the first move**  
Simply contact your small commercial underwriter or region leader and let them know you're interested.
- 2 Let's meet**  
Our transfer book team sets up a meeting to discuss our process and answer questions.
- 3 Evaluate for success**  
We evaluate your five-year production records and policy listings.
- 4 Analysis for alignment**  
Our team generates an analysis on how your books align with our business for risk appetite.
- 5 Quote samples for pricing**  
We are happy to provide the option of test quotes for pricing analysis.
- 6 Timeline that works for you**  
Together, we pick a start date and begin the rollover.
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# Personal Lines

## ► More profit, no hassle

- Custom analysis of how transfers will impact your bottom line.
- Code and track the performance of your personal and commercial transfer customers on an ongoing basis.
- Earn higher-than-average new business commissions from WesPak® and WesPak Estate® products as well as special deposit incentives from Westfield Bank for your Agency Savings Account.
- Streamline your agency management functions when you consolidate your business with Westfield to focus more on your core markets.
- Help customers get a price matching benefit! We'll match up to 20% of their prior carrier premium.



"Thank you all for a wonderful job! You have made this process very easy and organized. Hope to work with you again, soon!"

— Senior Account Executive, OH

**You don't have to chew up time calculating the benefits of transfers. We do it for you.**

- 1 Dedicated transfer team**  
 You work directly with a dedicated transfer book team expert. Transfer is all these folks do, so they know how to simplify the process and help you explain what's happening to your customers.
- 2 We handle the details**  
 We tap into your management system to access accounts and give you easy-to-understand price and coverage comparisons. From there, we handle the transfer from initial ratings to final issue of the policy.
- 3 Underwriting simplified**  
 We treat each account as if it's already part of our book of business and follow familiar underwriting guidelines. That cuts down on questionnaires and paperwork, reducing the time it takes for your agency.
- 4 Messaging made easy**  
 Our Transfer Agency Toolkit includes customizable letter and email templates. You can use them to walk customers through the process and benefits of transferring to Westfield.
- 5 Customer Service Center**  
 If you are part of our service center, you may opt to have your accounts transferred directly there upon issue. Your customers get great Westfield service, and we focus on account rounding and higher-than-average retention.



# Our Streamlined Transfer Approach

“You did a great job preparing us for the challenges of a large book transfer and you provided us with great support. Our staff is in complete agreement that your team was the key to making this a success and we would not hesitate to initiate another transfer in the future.”

— *Ohio Agent*

- **Team effort:** Our dedicated transfer book teams set us apart from a lot of carriers. Team members devote all their time to helping agents move books of business. They know their stuff. And they are always available to make the process smooth and seamless.
- **Underwriting ease:** A key way we keep the book transfers simple? Treat each account as if it’s already part of our book of business, following familiar underwriting guidelines. That approach means fewer and easier questionnaires, and less work and time commitment for your agency.
- **Targeted training:** Explaining a transfer to your customer can feel like a challenge. To make it easy, we’re at the ready to provide training and help. We’ll work with your staff to nail down the best way to walk your customers through the transfer process. We also help with your underwriting and marketing efforts so you have support every step of the way.
- **Tools at your fingertips:** With Westfield’s Transfer Agency Toolkit, all the resources and information you need for simple transfers are a few clicks away. You have quick access to letter and email templates to share information with your customers about Westfield and the transfer process.
- **Timely service on all accounts:** It’s essential to keep your agency running smoothly at all times. To help assure that transfers don’t end up being a time drag, you continue working with your current underwriter for all new business opportunities. Meanwhile, a transfer book team member focuses solely on helping you with the business you’re consolidating.



The information provided on products and/or services described are intended to present a general overview. All applications for insurance are subject to normal underwriting standards and guidelines applicable to a risk. Westfield Insurance reserves the right to change any of the terms and conditions or the availability of products and services. Products and services may not be available in all states.