

The Potter Group, Inc.

To become affiliated, please follow the instructions below.

1. **Sign the Membership Application.**
2. Complete the **W-9 form, Producer Profile** and the **Office Profile** (for each office you have).
3. Sign and date the **Producer's Marketing Agreement**.
4. Send a copy of your **E & O** policy and a copy of each licensed producer's **license**.
5. Attach the **one-time processing fee** of one hundred fifty dollars (\$150) payable to: The Potter Group. (If for some reason you are not appointed, the money will be refunded.) Or, include the signed, completed E-check authorization with a copy of a voided check with your fax or e-mail of the completed appointment forms.
6. Complete the **Direct Deposit Authorization** form for your commissions (or you can opt out using this form).
7. *Fax, E-mail, or Mail* the fully completed forms to:

The Potter Group, Inc.
3085 Southwestern Blvd Suite 201
Orchard Park, NY 14127
Fax: 1-716-712-0428 or 1-716-712-0429
E-mail: ejd@thepottergroup.com
8. If you have any questions, please call our office at: **1-800-682-5049** x11

CHECKLIST BEFORE SENDING:

- 1) Membership Application
- 2) W-9 form
- 3) Office Profile
- 4) Producer Profile
- 5) Producer's Marketing Agreement
- 6) Proof of E&O
- 7) Current Insurance License (for each licensed individual &/or corp)
- 8) Check or E-check authorization for the one-time processing fee of \$150.00 made payable to The Potter Group
- 9) Direct Deposit Authorization form for your commissions (or opt out)

Welcome to The Potter Group