

The Potter Group, Inc.

To become affiliated, please follow the instructions below.

1. **Sign the Membership Application.**
2. Complete the **W-9 form, Office Profile** and the **Producer 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 agent's **license**.
5. Attach the **one-time processing fee** of one hundred twenty-five dollars (\$125) 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. **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: cclark@thepottergroup.com
7. If you have any questions, please call our office at: 1-800-682-5049 x19

CHECKLIST BEFORE SENDING:

- 1) **Membership Application**
- 2) **W-9 form**
- 3) **Agency Profile**
- 4) **Producer Profile**
- 5) **Producer's Marketing Agreement**
- 6) **Proof of E&O**
- 7) **License**
- 8) **Check or E-check authorization for the one-time processing fee of \$125.00 made payable to The Potter Group**

Welcome to The Potter Group