

myBeazley Broker Reference Guide

mybeazleyusa.com/quote

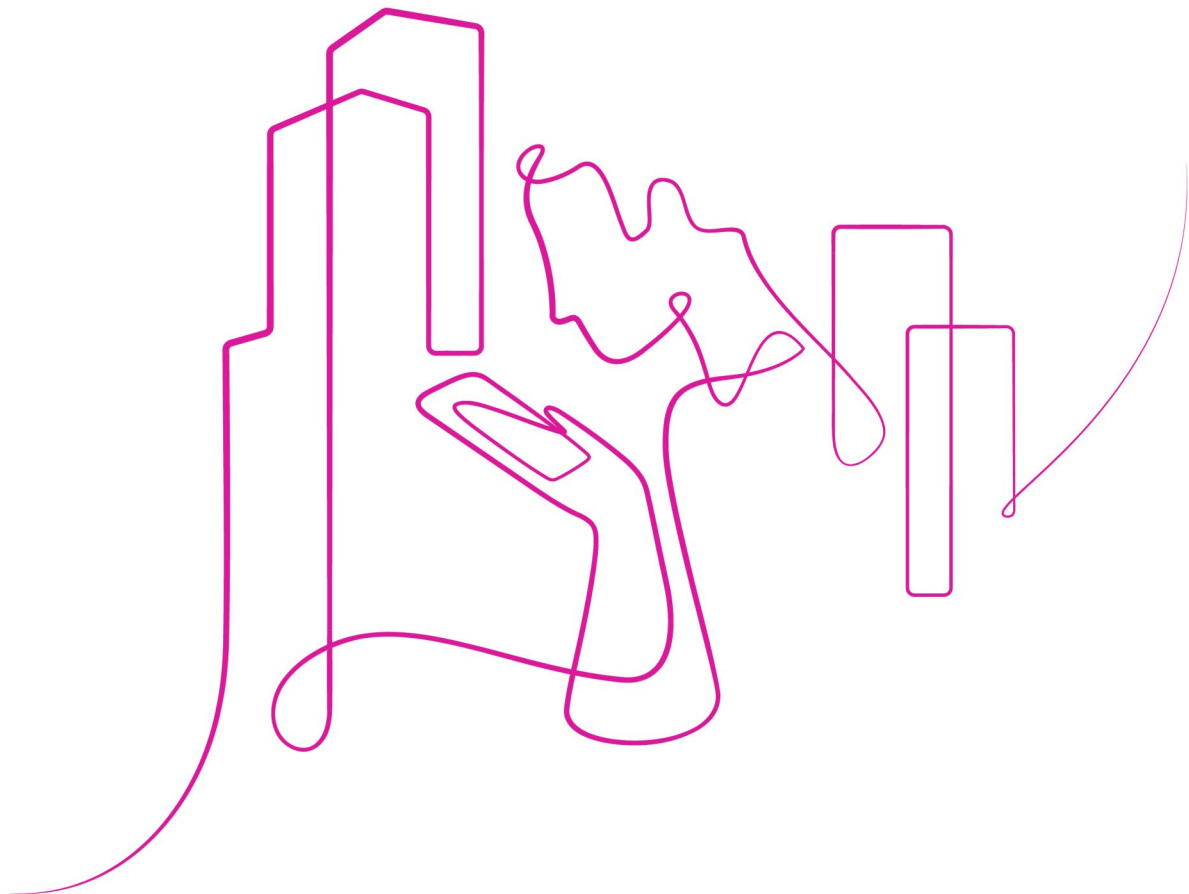
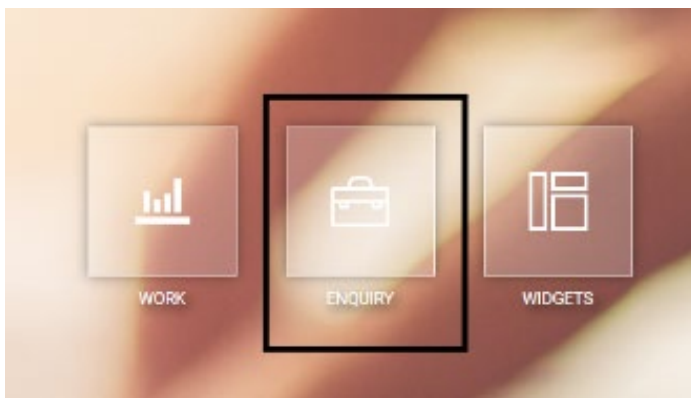


Table of contents

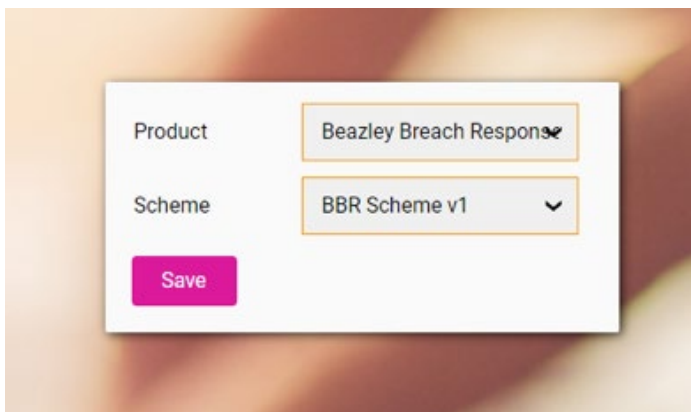
| | |
|---------------|----|
| How to Submit | 2 |
| How to Quote | 6 |
| How to Refer | 8 |
| How to Bind | 10 |

How to submit

1. Select the enquiry box.



2. Select 'Beazley Breach Response' for 'Product' and 'BBR Scheme v1' for 'Scheme'. Press 'Save'.



3. For field 'Website' a valid website is needed to submit on the portal. If the insured does not have a valid website, please email your submission to PE_Submissions@Beazley.com
 - a. For field 'Website' a valid website is needed to submit on the portal. If the insured does not have a valid website, please email your submission to PE_Submissions@Beazley.com
 - b. For field 'Inception Date Unknown', if the answer 'Yes' is selected an indication will be offered instead of a bindable quote. In order to obtain a bindable quote this field will need to be updated to 'No' with a specified date listed in the field 'Inception Date'.

COMMON FIELDS

Save
Cancel

Common Fields

↳ Insured Information

Named Insured Details

Name:

Street:

City:

State: Zip Code:

Website:

Risk Manager Information

Risk Manager Name: Risk Manager Email: Risk Manager Phone:

↳ Risk Information

Inception Date Unknown: Yes No

Inception Date:

Expiry Date:

Industry Group:

Industry Class:

NAICS Code:

Product: **Beazley Breach Response**

Does the company have any THC marijuana exposure as a grower, wholesaler, or medical or recreational retailer of marijuana? Yes No

Total Revenue for the last 12 months?

Total Employee Count:

↳ Classification Information

Submission Type:

External Quote ID:

Insurance Structure:

Program:

Affinity Identifier:

Initiative:

↳ Clearance

Once you have populated the required information in the Common Fields tab, please save your inputs so that a clearance check can be performed.

Clearance Status:

4. Industry class is a mandatory field to be filled out in order to submit.
 - a. As a best practice, our recommendation is to search within the 'Industry Class' field first. If you are not familiar with NAICS you can utilize the keyword search capabilities from the US Census website.
 - b. If you know the insured's 'NAICS Code' please fill in the field and 'Industry Class' and 'Industry Group' will autofill in accordingly.
 - c. If you know the insured's 'Industry Class' please fill in the field and 'NAICS Code' and 'Industry Group' will autofill in accordingly.
 - d. If you do not know the insured's 'Industry Class' or 'NAICS Code' selecting the most appropriate 'Industry Group' from the list will narrow down the options seen in 'NAICS Code' and 'Industry Class'.

- Risk Information

Inception Date Unknown: ? Yes No

Inception Date: ?

Expiry Date: ?

Industry Group: ? - Please Select - ▼

Industry Class: ? - Please Select - ▼

NAICS Code: ? - Please Select - ▼

Product Beazley Breach Response

Does the company have any THC marijuana exposure as a grower, wholesaler, or medical or recreational retailer of marijuana? Yes No

Total Revenue for the last 12 months?

Total Employee Count: - Please Select - ▼

- Select the 'Save' button at the top of the screen. The 'Clearance Status' will be updated at the bottom of the screen to 'Submitted'.

COMMON FIELDS ◀ ▶

Save Cancel

Common Fields

The insured is eligible for surplus lines policy.

Please note that you cannot continue to quoting unless your risk clearance status = 'Reserved'. If your clearance status is 'Submitted', our Clearance team are reviewing your submission and will provide a status update once complete. If you

Insured Information

Named Insured Details

Name: Broker Manual Text
 Street: 30 Patterson Road
 City: Farmington
 State: Connecticut Zip Code: 10005
 Website: www.beazley.com

Risk Manager Information

Risk Manager Name: Risk Manager Email: Risk Manager Phone:

Risk Information

Inception Date Unknown: Yes No
 Inception Date: 30-Apr-2023
 Expiry Date: 30-Apr-2024
 Industry Group: Public Administration
 Industry Class: Administration of Conservation Programs
 NAICS Code: 928120
 Product: Beazley Breach Response
 Does the company have any THC marijuana exposure as a grower, wholesaler, or medical or recreational retailer of marijuana? Yes No
 Total Revenue for the last 12 months? 5,000,000
 Total Employee Count: Small = 100 or less

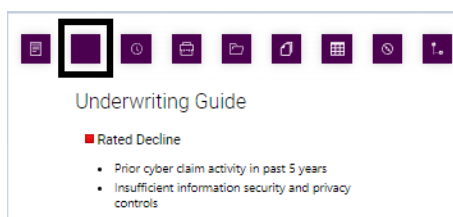
Classification Information

Submission Type: Portal
 External Quote ID:
 Insurance Structure: Primary
 Program:
 Affinity Identifier:
 Initiative:

Clearance

Clearance Status: Submitted

- Once the clearance process has completed the 'Clearance Status' will be updated accordingly. Statuses that may appear in the 'Clearance Status' field are as follows:
 - Submitted= Recently submitted, clearance result has not been generated yet
 - Pending Submission= Submitted, clearance result has not been generated yet
 - Reserved= Submitted and reserved, broker is able to proceed with quoting
 - Declined= Submitted and declined, broker is unable to proceed with quoting. Declination reason can be viewed under the 'Underwriting Guide' within the navigation pane.



How to quote

1. Once 'Clearance Status' reads as 'Reserved' you can proceed to the 'BBR Applications Questions' tab.

COMMON FIELDS **BBR APPLICATION QUESTIONS**

Save Cancel

Information Security & Privacy Controls

1. Does the company use firewall & anti-virus software to protect their computers? Yes No
2. If the company accepts credit cards as a form of payment, are they or their credit card processor (e.g. PayPal, Square, etc.) PCI compliant? Yes No N/A
3. Before processing a wire transfer, does the company confirm the request by a secondary means of communication? Yes No N/A
4. Does the company or any other proposed insured (including any director, officer or employee) have knowledge of or any information regarding any fact, circumstance, situation, event, or transaction which may give rise to a claim, loss or obligation to provide breach notification under the proposed insurance? Yes No
5. During the past five years has the company:
 - 5.A. Received any claims or complaints with respect to privacy, breach of information or network security, or unauthorized disclosure of information? Yes No
 - 5.B. Been subject to any government action, investigation or subpoena regarding any alleged violation of a privacy law or regulation? Yes No
 - 5.C. Notified customers or any other third party of a data breach incident involving the Applicant? Yes No
 - 5.D. Experienced an actual or attempted extortion demand with respect to its computer systems? Yes No

Ransomware Controls

6. Does the company allow remote access to your network? Yes No
7. Do you permit users remote access to web-based email (e.g., Outlook Web Access (OWA))? Yes No
8. Does the company regularly (at least annually) provide cyber security awareness training, including anti-phishing, to all individuals who have access to your organization's network or confidential/personal data? Yes No
9. Does the company implement critical patches and update systems (within 2 months)? Yes No
10. Does the company scan incoming emails for malicious attachments and/or links? Yes No
11. Does the company protect all of their devices with anti-virus, anti-malware, and/or endpoint protection software? Yes No
12. Does the company regularly back up critical data? Yes No
13. Does the company use Microsoft Office 365? Yes No
14. Does the company have any end of life or end of support software on their network? Yes No

2. Answer all application questions. Select 'Save'.
3. Proceed to 'Quote Options' tab to view available options and select which options you'd like to appear on the quote letter. Select 'Save'.

COMMON FIELDS **BBR APPLICATION QUESTIONS** **QUOTE OPTIONS**

Save Cancel

Quote Options

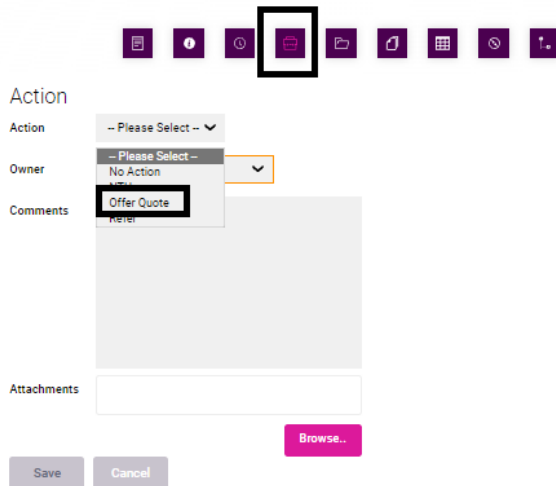
Industry Administration of Conse Revenue 5,000,000

Quote Options

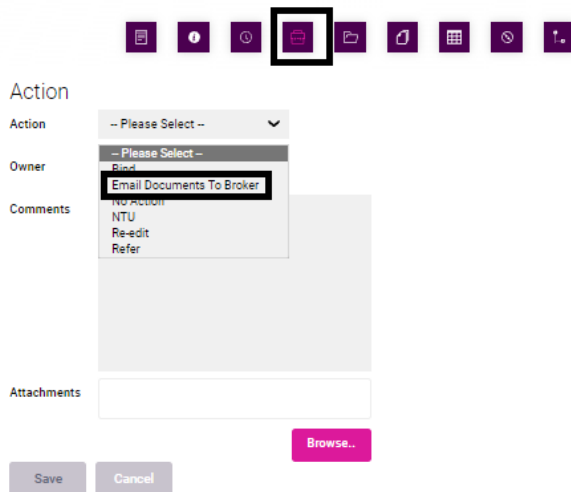
| Options | Notified Individuals | Policy Aggregate Limit of Liability | Each Claim Retention | Breach Response Services Retention | Legal Services Retention | Premium | |
|---------|----------------------|-------------------------------------|----------------------|------------------------------------|--------------------------|----------|---------------------------------------|
| 1 | 100,000 | \$ 1,000,000 | \$ 1,000 | \$ 1,000 | \$ 500 | \$ 3,020 | <input checked="" type="checkbox"/> X |
| 2 | 100,000 | \$ 1,000,000 | \$ 2,500 | \$ 2,500 | \$ 1,250 | \$ 2,720 | <input checked="" type="checkbox"/> X |
| 3 | 100,000 | \$ 2,000,000 | \$ 1,000 | \$ 1,000 | \$ 500 | \$ 3,640 | <input type="checkbox"/> X |
| 4 | 100,000 | \$ 2,000,000 | \$ 2,500 | \$ 2,500 | \$ 1,250 | \$ 3,290 | <input type="checkbox"/> X |

Select all options

4. Go to the 'Actions and History' tab and select 'Offer Quote' under 'Action' and select 'Save'.
 - a. The system will automatically email you the quote documents.

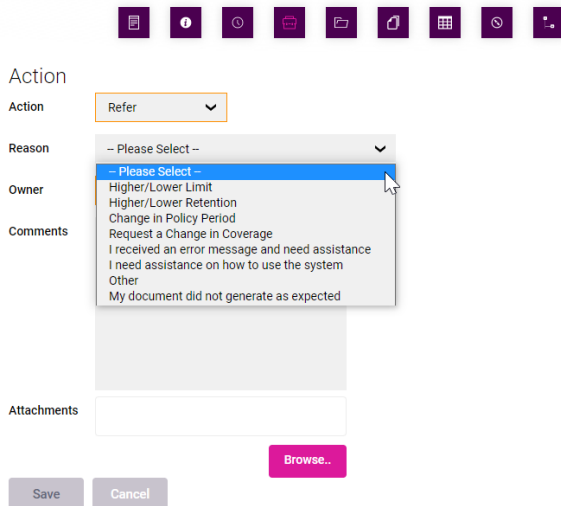


5. If you do not receive an email containing your quote documents for any reason, you can re-send the quote documents by navigating to the 'Actions and History' tab and selecting 'Email Documents to Broker' under 'Action'. Select 'Save'.



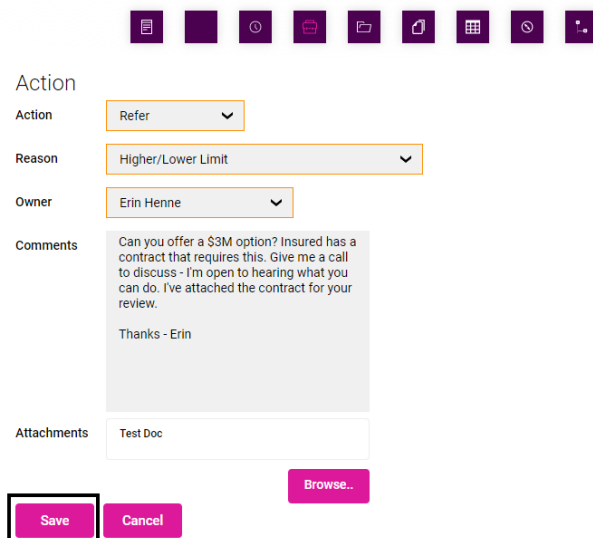
How to refer

1. Go to the 'Actions and History' tab and select 'Refer' under 'Action'.
2. Select a referral 'Reason' from the drop down.



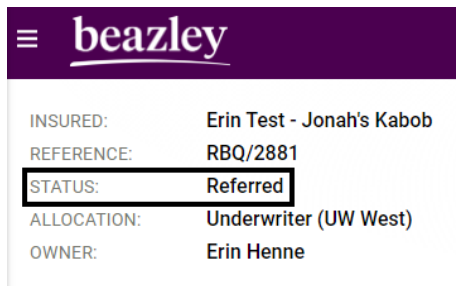
The screenshot shows a web form titled 'Action' with a dropdown menu set to 'Refer'. Below it, the 'Reason' dropdown menu is open, displaying a list of options: '-- Please Select --', 'Higher/Lower Limit', 'Higher/Lower Retention', 'Change in Policy Period', 'Request a Change in Coverage', 'I received an error message and need assistance', 'I need assistance on how to use the system', 'Other', and 'My document did not generate as expected'. The 'Comments' field is empty. There is a 'Browse...' button for attachments and 'Save' and 'Cancel' buttons at the bottom.

3. Within the 'Comments' field, provide a detailed explanation / reasoning for why you are requesting this referral.
4. Optionally, select the 'Browse...' button to upload any documentation supporting your request.
5. Select 'Save'



The screenshot shows the 'Refer' form with the following fields filled out: 'Action' is 'Refer', 'Reason' is 'Higher/Lower Limit', and 'Owner' is 'Erin Henne'. The 'Comments' field contains the text: 'Can you offer a \$3M option? Insured has a contract that requires this. Give me a call to discuss - I'm open to hearing what you can do. I've attached the contract for your review. Thanks - Erin'. The 'Attachments' field shows 'Test Doc'. The 'Save' button is highlighted with a red border. There is also a 'Browse...' button for attachments and a 'Cancel' button.

- The risk will progress into 'Referred' status and allocate to an underwriting or support team for review.



INSURED: Erin Test - Jonah's Kabob
REFERENCE: RBQ/2881
STATUS: Referred
ALLOCATION: Underwriter (UW West)
OWNER: Erin Henne

- Beazley will review your referral request and allocate the risk back to you within 24 hours.
- To view comments that you have made to Beazley and comments that Beazley has made for you, navigate to the 'Underwriting Guide' within the navigation pane.



Underwriting Guide

Information

- Allocate to Broker - Other - Erin Henne - 03-May-2023 - 17.30 - Erin - It was nice talking to you earlier today. As discussed we cannot offer a \$3M.

Thanks - Erin UW

- Refer - Higher/Lower Limit - Erin Henne - 03-May-2023 - 17.19 - Can you offer a \$3M option? Insured has a contract that requires this. Give me a call to discuss - I'm open to hearing what you can do. I've attached the contract for your review.

Thanks - Erin

How to bind

1. Go to the 'Actions and History' tab and select 'Refer' under 'Action'.
2. If you have a signed BBR Application attach in the 'Attachments' section. If you do not have a signed BBR Application you can still proceed with binding; however, a policy will not be issued until a signed BBR Application is received.
3. Select one option to bind.

Action

Action:

Reason:

Allocation:

Owner:

Have you attached a signed BBR Application? If not, please attach it in the Attachments section below. Yes No

Inception Date:

Expiry Date:

| Options | Notified Individuals | Policy Aggregate Limit of Liability | Each Claim Retention | Breach Response Services Retention | Legal Services Retention | Premium |
|---------|----------------------|-------------------------------------|----------------------|------------------------------------|--------------------------|----------|
| 1 | 100000 | \$ 1,000,000 | \$ 1,000 | \$ 1,000 | \$ 500 | \$ 3,020 |
| 2 | 100000 | \$ 1,000,000 | \$ 2,500 | \$ 2,500 | \$ 1,250 | \$ 2,720 |

Comments:

Attachments:

4. Select 'Save'.