



Smart Choice Insurance Agents: Member Agent Appointment

Dear Smart Choice Agent:

We are happy to announce that Liberty Mutual Surety has recently been selected as Smart Choice's "Surety of Choice." Liberty Mutual Surety is looking forward to establishing mutually profitable relationships with Smart Choice agents.

Why Liberty Mutual Surety?

Easy and efficient processes provided through designated online platforms and teams of specialists.

- Agents' Portal – major tools and resources located in one place
- Quote & Issue – designed to underwrite a variety of transactional bond obligations:
 - License & Permit
 - Business Service bonds (up to \$200,000)
 - ERISA bonds (up to \$1,000,000)
 - Public Official bonds (up to \$250,000)
 - Court bonds including Administrator and Executor Probate bonds (up to \$2,000,000)
 - Notary and Notary with E&O
 - Miscellaneous bonds
- National Bond Center (NBC) – highly trained underwriters to assist with a variety of bond services. This includes bonds that are needed outside of the scope of Quote & Issue.
- Direct Bill or Credit Card options

Getting Started – Appointment Process

Smart Choice Agents should contact Leslea Nichols by email Leslea.Nichols@libertymutual.com or phone (469) 387-8223 to start the appointment process. The following paperwork will be required to get started. Check your state Department of Insurance websites for information specific to your state.

New Requests (Without an existing Liberty Mutual or Safeco Appointment)

[New Appointment Form](#)
[Individual Disclosure](#)
[Background Questionnaire](#)

Line of Business (If you already have Safeco or Liberty Mutual Appointment)

[Individual Disclosure](#)
[Background Questionnaire](#)
[Quote & Issue Agency and Producer Appt Change Form](#)

Interested in more information? View the Liberty Mutual Surety informational guides on some of the services mentioned above.

[Agents' Portal](#)
[NBC Overview](#)
[Quote & Issue Guide](#)

ISSUE BONDS IN MINUTES WITH QUOTE & ISSUE!

Quote & Issue (Q&I), Liberty Mutual Surety's™ online bond platform, is designed to underwrite and process commercial and fidelity transactional bonds in minutes. Just fill in a few simple questions and you can quote and issue a bond for your customer in an instant.



Benefits

- You can quote and issue a bond for your customer in real time, right from your computer.
- You can choose from a variety of billing methods: credit card, direct bill, or agency bill.
- You will receive 30% commission on most bonds (20% for ERISA and Business Services).
- You can make endorsements to your bonds online including credit card payments, name and address changes, bond date changes, and change billing method request.
- You can save money in postage since your clients receive their bond package via email.

Products

Choose from more than 4,000 commercial bond products written on Ohio Casualty Insurance Company paper:

- License & Permit Bonds up to \$150,000
- Business Services Bonds up to \$200,000
- ERISA Bonds up to \$1,000,000
- Public Official Bonds up to \$250,000
- Court (plaintiff) bonds up to \$150,000
- Probate (Administrator and Executor) up to \$2,000,000
- Notary Bonds
- Miscellaneous Bonds

**Bonds that are not available in Q&I can be considered by reaching out to the National Bond Center*

Getting Started

Simply go to the Liberty Mutual Surety Agents' Portal at <https://Agents.LibertyMutualSurety.com>, enter your login information, and select Get Started.

If you would like step-by-step instructions on how to use Quote & Issue, you can download the Q&I Orientation Guide from the Brochure section of "About Liberty Mutual Surety" in the Agents' Portal. You can also learn more about servicing your bonds via the Q&I Servicing flyer, also available in this location.

Contact Us

If you need assistance logging into the portal, please contact your agency administrator. If your administrator needs help, they should contact the Liberty Mutual Surety Agency Interface Support Group at 866-773-4495 or AISGSuretySupport@LibertyMutual.com.

For all other Quote & Issue questions, please contact the National Bond Center at 888-844-2663 or Bonds@LibertyMutual.com.

Easy. Efficient. Empowering. That's E-Business.

