

# Branch Insurance Appointment Process

## Smart Choice Virginia

August 2022

[Learn More about Branch Insurance](#) [Branch Website](#)

Agents who would like an appointment with Branch should review the Agent Profile to verify Eligibility. If the agency meets the Eligibility Guidelines, then the agent completes the [Branch Insurance Online Form](#) (which goes to a Branch Sales Rep) to begin the Appointment process. The Sales Rep reviews the info and contacts the agent for a discussion. If the agency is approved for an appointment, the process continues and the Agent will be asked to send a copy of the agency E&O, agency license, and producer licenses to [agencyonboarding@ourbranch.com](mailto:agencyonboarding@ourbranch.com).

### Eligibility for Appointment:

1. **P&C Agency has been in business for 1 or more years**
2. **Agency writes Preferred or Standard Personal Lines Business**
3. **Agency has the ability to write \$25,000 PL Production or more annually**

### Summary of Branch Insurance Appointment Process

1. **Agent Completes the Branch Online Form:**  
<https://ourbranch.typeform.com/to/h3P9Xuqk>
2. **Branch sales manager reaches out to agent.**
3. Branch sales manager approves agency to move forward with appointment.
4. Email will be generated to main contact at Smart Choice--Misty Field or TM
5. Territory Manager fills out information for agency on Shared Google Sheet
6. Agent or TM emails the E&O and license (if needed) to  
[agencyonboarding@ourbranch.com](mailto:agencyonboarding@ourbranch.com)
7. Agency appointed with Branch and receives login credentials.

Branch Website: <https://ourbranch.com/>

**For Assistance, Contact Roger Gill (804) 731-3050 or Daniel Brown (804) 896-3959**