

Sample Broker of Record Letter

Company's Letterhead

{Current Date}

ABC Insurance Carrier
Street
City, State Zip Code

RE: ABC Policy # 12345

To Whom It May Concern:

This will notify you that effective {date}, our company has appointed Broad Reach Benefits, Inc. as our Broker of Record for the above policy. Please copy Broad Reach Benefits, Inc. on all pertinent information relating to our contract.

This designation of Broker of Record will remain in effect until we notify you in writing to the contrary. This replaces any previously appointed broker.

Sincerely,

{signature}

Company Official Title