

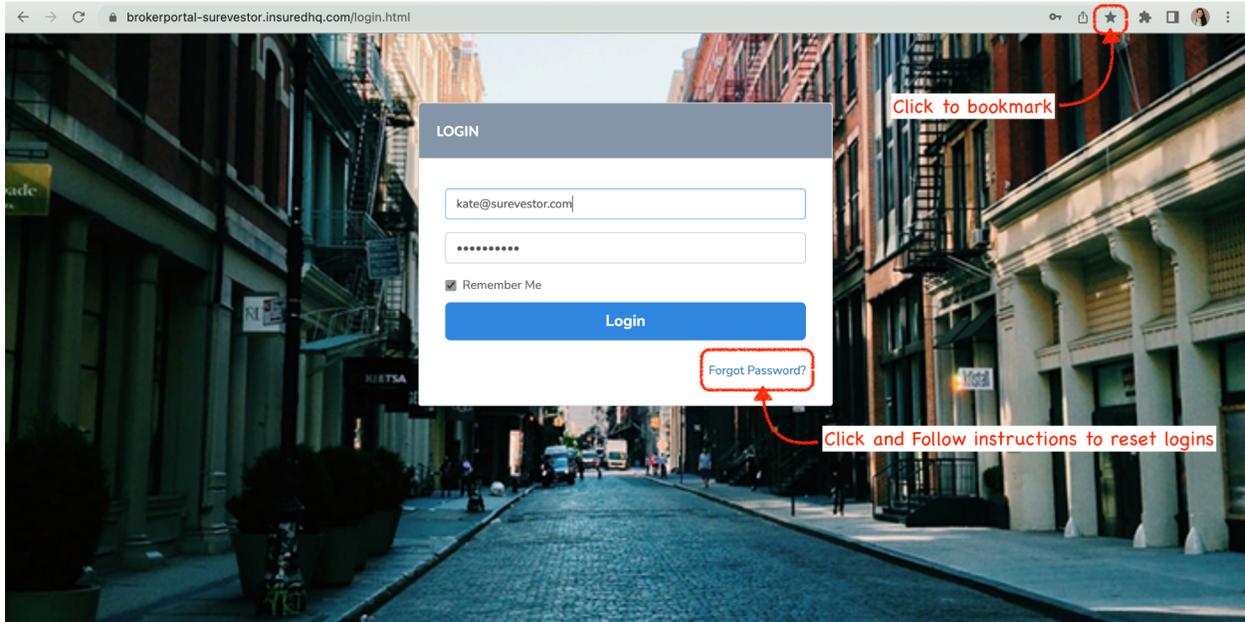


SUREVESTOR[®]
INC.
INSURANCE. INNOVATION. INSPIRATION.

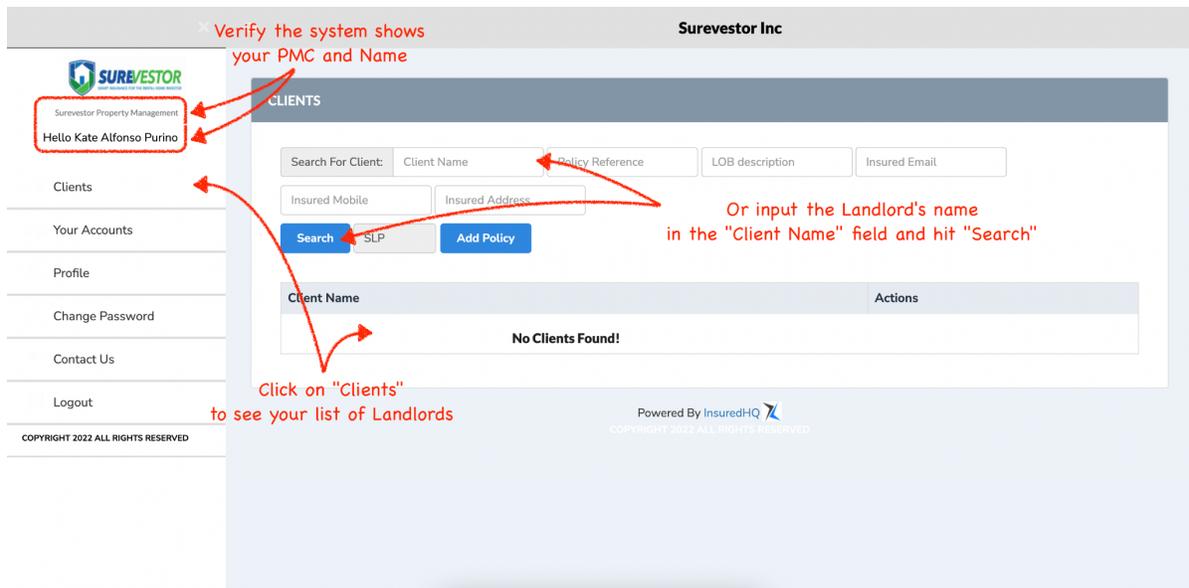
Property Manager's Insurance Portal Operating Instructions

STEP 1: Log in to the portal with your email and password. If you can't remember or lost your password, click on *Forgot Password?* to receive login reset instructions. Bookmark the page for quick access.

Portal Link: <https://brokerportaluatusa-surevestor.insuredhq.com/>



Step 2: Make sure that you verify the PM Company you're registering with. Click on **Clients** to view your list of Landlords on file; you may also input the Landlord's Name in the **Client Name** field and hit the Search button to pull up a specific Landlord record.



Optional - Step 3: To add a new Landlord record, click on **Add Policy** and complete the form that follows. Fields marked with * are required. If the Landlord is a Company, type in the Company name under the **Legal Name** field instead. Don't forget to scroll to the bottom to hit **Save and Continue**.

Surevestor Inc

SUREVESTOR
Surevestor Property Management
Hello Kate Alfonso Purino

Clients

Your Accounts

Profile

Change Password

Contact Us

Logout

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CLIENTS

Search For Client: Client Name Policy Reference LOB description Insured Email

Insured Mobile Insured Address

Search SLP **Add Policy** ← Click to add a new Landlord

Client Name	Actions
No Clients Found!	

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Add New Client

ACCOUNT INFORMATION

*Salutation None

First Name

Middle Name

*Last Name

*Legal Name

*Email Address

MAILING ADDRESS

State

State Code

Physical ZipCode

PHONE NUMBERS

Phone Country Code Area Code

Work Phone Country Code Area Code

Mobile Country Code Area Code

Save and Continue

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Step 4: Once you have the Landlord record you wish to view or submit a policy request for, simply navigate back to the Clients tab and click on **Manage Client** beside the Landlord's name.

CLIENTS

Search For Client: Client Name Policy Reference LOB description Insured Email

Insured Mobile Insured Address

Search **SLP** **Add Policy**

Client Name	Actions
Darwin Watterson	Manage Client
David G Holt	Manage Client

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This will open up a new page with the **Landlord's information** (top of page), an **Add Policy** button (middle of page), and a **List of their Policies** (bottom of page). You could click on the **View Landlord Info** button in the upper right corner to view and to edit the Landlord record. You could scroll down to view existing Landlord records, and click on the **View Policy**

History to preview a specific Policy and its history. And of course, you could click on **Add Policy** to place a new Policy Request for this Landlord.

Landlord's Information

Insured: Darwin Watterson Phone: 203 123 4567
Account: HOL0003 Email: Darwin@WatersonPM.com
Mailing Address: 2115 East Belt Line Road Dallas
County
Carrollton, 75006
Physical Address: 2115 East Belt Line Road Dallas
County
Carrollton, 75006

Click here to edit Landlord Info

Policy List Client Accounts

SLP Add Policy Click to Request Policy for this Landlord

Policy Information

SLP Scheer Landlord Protection Insurance Policy
Policy/Claim #: SLP2022000183

Latest Transaction Date/Time	04/29/2022 17:05:10
Currency	\$
Policy Class	SLP Scheer Landlord Protection Insurance Policy
Policy Transaction Type	Endorsement
Inception Date - Policy End Date	05/03/2022 - 04/29/2023
Total Period Premium	\$ 467.25
Policy Category	
Policy Reference	123 Main street, Houston, TX, 77001
Total This Transaction	\$ 0.00

Click to view Policy History

Step 5: Complete the Scheer Landlord Protection Policy - Application - Request for Cover. Under the Disclosure tab, make sure that you read and download the **Master Policy Document** for your state. Under the Landlord Details, make sure that you read and understand the **State Fraud Warnings**.

The portal will highlight required fields and prompt you to complete them before you can move forward with the form.

Scheer Landlord Protection Policy - Application - Request for Cover

If you are already aware that there is a circumstance which means the tenant may not be able to pay rent, or is planning to break their lease, you will not be covered for this loss under the master policy. Any losses that have already been incurred or are in the process of occurring are not covered if this cover is requested now. The Arrears at Commencement for cover exclusion applies to all new requests for cover.

All sections of this form must be completed for us to consider granting cover. This is a request for cover only and the offer of insurance is only confirmed when we have issued you an Invoice/Certificate of Insurance. The cover is confirmed when we have received payment of the premium. If you are unsure of any of the requirements, please phone us on (800) 975-0562 during office hours.

The cover provided is the Scheer Landlord Protection cover at \$445.00 per year standard premium before applicable State Taxes, Fees and Charges.

Download the master policy document below:
[Master Policy document for PMCs in California](#)
[Master Policy document for PMCs in all other States](#)

Click on the links to read and download the Master Policy document

I/We have read and understood the above

Next

Landlord - Policy Holder Details

Salutation	Mr
First Name(s)	Darwin
Last Name	Watterson
Company Name (if applicable)	Darwin Watterson
Email Address	Darwin@WatersonPM.com
Mailing Address	2115 East Belt Line Road, Dallas County, Carrollton, Texas, TX, 75006
Physical Address	2115 East Belt Line Road, Dallas County, Carrollton, Texas, TX, 75006
Phone Number	203 123 4567

I have read the [State Fraud Warnings](#) for USA citizens. This field is required

Previous

Next

Residential Rental Property Details

Type of Dwelling	<input type="text" value="-- Select --"/>
	Please select an item in the list
Address	<input type="text" value="Enter Address Here..."/>
	This field is required
City	<input type="text"/>
	This field is required
State	<input type="text"/>
	This field is required
State Code	<input type="text"/>
	This field is required
ZIP Code	<input type="text"/>
	This field is required

Property Manager Details

Name of Property Management Agency	<input type="text" value="SureVestor Property Management"/>
Property Manager	<input type="text" value="Kate Alfonso Purino"/>
Property Manager State	<input type="text" value="FL"/>

Previous

Next

Under the **Underwriting Questions** section, the system will reject the request if the Tenant Rent Payment History, Property Occupancy, and Rental Amount do not meet the underwriting requirements.

Underwriting Questions

Has this tenant been behind in their rental payments by more than 5 days in the last 2 months? No Yes

Loss of rent incurred before the commencement date is not covered. Arrears at commencement of policy will affect cover.

Has the residential rental property been unoccupied for 60 days or more? No Yes

Sorry, we can't offer insurance for this property. Please submit a new cover request when you have a move-in date for your next tenant.

Have you verified the tenants capacity to meet the financial terms of this lease? No Yes

Rent Levels Insurable

What is the verifiable monthly rent for the residential rental property?

Insurance can only be offered where the monthly rental is more than \$1,000 per month

Cover Commencement Date

Cover commencement date

Previous **Next**

The cover commencement date is also a required field, and it will only accept the **current or future dates**.

Cover Commencement Date

Cover commencement date

Previous

May 2022						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

The last section of the Policy Request Form shows the **Premium Summary**. You have two options to pay the Policy: Monthly or Annually.

When paying **Monthly**, please note the \$50 additional premium applied to the final cost of the policy. Hit **Pay Now** to input your Credit Card information on the next page; this card will be saved for future installments on the policy, and may be updated in the Settings tab. When you're done, simply click **Pay \$\$\$** and the system will charge your card.

The screenshot shows a web form titled "Premium Summary" with a navigation bar at the top containing "Disclosure", "Landlord Details", "Residential Property Details", "Underwriting Questions", and "Premium Summary". The form contains a table of charges and a declaration section.

Item	Amount
Payment Type	Monthly
Premium Charge	300.00
RPG Fee	195.00
Total Premium Charges	495.00
Surplus Lines Tax	9.00
Stamping Fee	0.00
State Surcharge 1	0.00
State Surcharge 2	0.00
Total Taxes	9.00
TOTAL PREMIUM	504.00
MONTHLY PREMIUM TO BE INVOICED	42.00

Declaration

Note: A \$50 additional premium will apply for Monthly Payments (see Payment Type: Monthly).

Upon receipt and processing of this form, Surevestor will send by email the Invoice & Certificate of Insurance, Master Policy wording & Surplus Lines disclosures, and Key Facts Information Sheet to the Property Management Company and the Landlord Policy Holder, confirming that the request has been accepted and that the cover has been placed subject to payment.

PAYMENT IS DUE WITHIN 14 DAYS.

Buttons: Previous, Save, Pay Now

Disclosure | Landlord Details | Residential Property Details | Underwriting Questions | Premium Summary | **Pay now**

Darwin Penny, thank you for trusting SureVestor. This is a secure payment gateway; credit card details will be stored for future payments / installments and may be updated under the account settings.

Note that an additional 3.0% processing fee may be applied for credit card transactions.

Payment Method: Credit Card

Card Number*: 4242424242424242

Expiry Date*: 10/2028 (in mm/yyyy format)

CVC*: 314

Previous **Pay \$43.26**

When paying **Annually**, you may **Pay Now** or **Bind the Policy and Pay Later**.

When you choose to **Pay Now**, you may pay by **Credit Card** or **Bank Account / ACH**. Input your **Credit Card** or **ACH** information, and click **Pay \$\$\$**.

When you choose to **Bind and Pay Later**, the system will bind the policy and send an invoice by email. Payment instructions will be on page 3 of the emailed invoice, detailing our mailing address where you could send a check to, and our **ACH** information.

Disclosure | Landlord Details | Residential Property Details | Underwriting Questions | Premium Summary | **Pay now**

Darwin Penny, thank you for trusting SureVestor. This is a secure payment gateway; credit card details will be stored for future payments / installments and may be updated under the account settings.

Note that an additional 3.0% processing fee may be applied for credit card transactions.

Payment Method: Bank Account

Account Holder Name*: Jenny Rosen

Account Holder Type*: individual

Routing Number*: 110000000

Account Number*: 000123456789

Previous **Pay \$452.50**

Premium Summary

Payment Type	Annually
Premium Charge	250.00
RPG Fee	195.00
Total Premium Charges	445.00
Surplus Lines Tax	7.50
Stamping Fee	0.00
State Surcharge 1	0.00
State Surcharge 2	0.00
Total Taxes	7.50
TOTAL PREMIUM TO BE INVOICED	452.50

Declaration

Note: A \$50 additional premium will apply for Monthly Payments (see Payment Type: Monthly).

Upon receipt and processing of this form, Surevestor will send by email the Invoice & Certificate of Insurance, Master Policy wording & Surplus Lines disclosures, and Key Facts Information Sheet to the Property Management Company and the Landlord Policy Holder, confirming that the request has been accepted and that the cover has been placed subject to payment.

PAYMENT IS DUE WITHIN 14 DAYS.

Previous **Save** **Pay Now** **Bind and Pay Later**

Note: The page may take a few minutes to load and your browser may even prompt you to close or wait for the tab; please stay on the page as it continues to work in the background.

The screenshot shows a web form titled "Premium Summary" with a progress bar at the top indicating the current step. The form contains a table of charges and a declaration section. A large "Processing. Please wait..." overlay is centered on the page, featuring two blue gears and a message: "Please wait while we are processing your request. This may take up to 30 seconds to complete. Thank you for your patience." At the bottom of the form are three buttons: "Previous", "Save", and "Bind Cover".

Item	Amount
Premium Charge	250.00
RPG Fee	195.00
Total Premium Charges	445.00
Surplus Lines Tax	21.98
Stamping Fee	0.27
State Surcharge 1	0.00
State Surcharge 2	0.00
Total Taxes	22.25
TOTAL PREMIUM TO BE INVOICED	467.25

Declaration

Upon receipt and processing of this form, Surevestor will send an Invoice/Certificate of Insurance, Master Policy Document, Specific State Fraud warnings, State Specific surplus lines disclosures and Key Facts Information will be emailed to the Property Management Agent's Office for payment. A copy will be sent to the Landlord Policy Holder confirming the request has been accepted and cover placed subject to payment of premium. Payment confirms acceptance of the terms and conditions of cover. **PAYMENT IS DUE WITHIN 14 DAYS.**

When the form is successfully completed, you will see the Thank you section.

The screenshot shows the "Thank you" section of the form. The progress bar at the top now highlights the "Thank you" step. The main content area contains the following text:

Thank you for your business

We confirm that your policy has been placed and documentation has been emailed to your office and the Landlord.

Payment confirms acceptance of the terms and conditions of cover. PAYMENT IS DUE WITHIN 14 DAYS.

Step 6: You may click on Clients > Landlord/Client Name > Search > Manage Client again to confirm that the new policy is in the system.

OPTIONAL

Click on **Profile** to view your current **Property Management Company** record. To request changes, email info@surevestor.com.

SV UAT Env

SURE/ESTOR
SureVestor Property Management
Hello Kate Alfonso Purino

Clients

Your Accounts

Profile

Change Password

Contact Us

Logout

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SureVestor Property Management's Profile

Client fields in app profile from Client Fields

Salutation	Mr
First Name	Kevin
Middle Name	
Last Name	Knight
Legal Name	SureVestor Property Management
Email	KevinKnight@surevestor.com
Client Type	PMC
Client Code	HOL0003
Trade Terms	14 Days
Branch	1
Mailing Address 1	214 Denali Street
Mailing Address 2	Polk County
Mailing City	Haines City

Click on **Change Password** to update your current password. Consider updating your password every few weeks.

Click on **Contact Us** to view our contact information.

Click on **Logout** to log out of the system after every use.



SureVestor Property Management

Hello Kate Alfonso Purino

- [Clients](#)

- [Your Accounts](#)

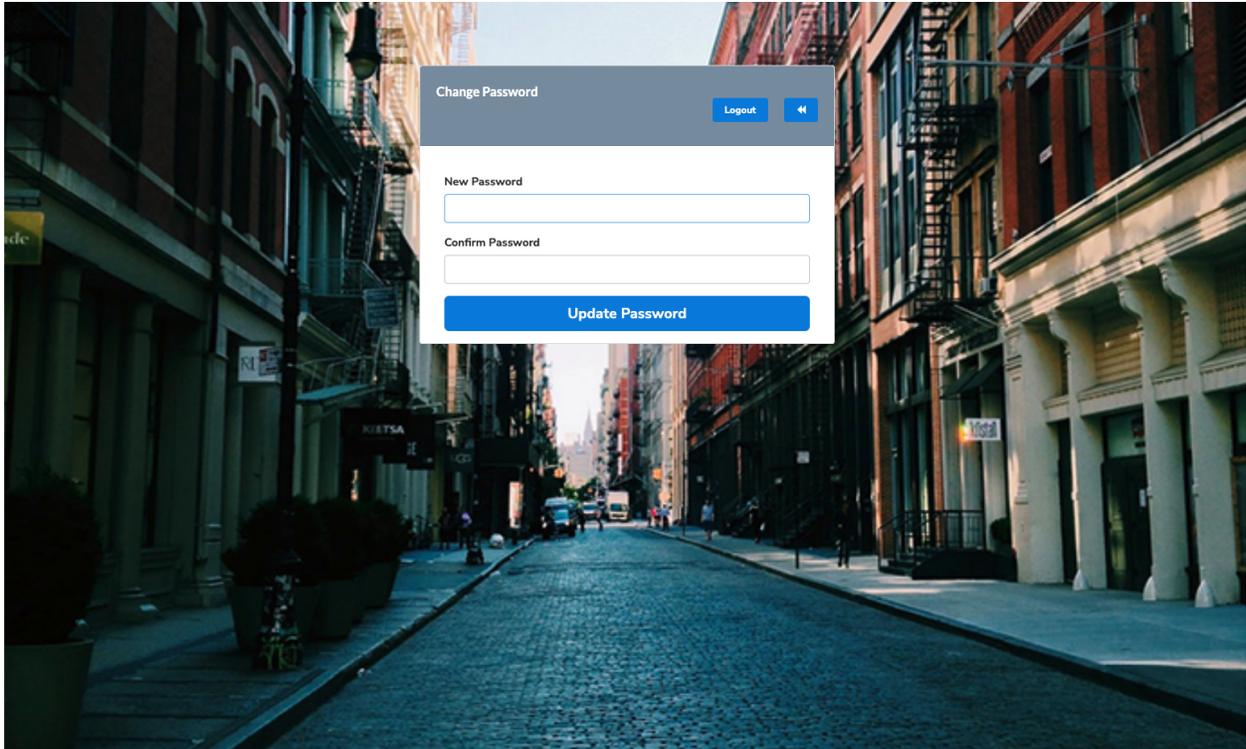
- [Profile](#)

- [Change Password](#)

- [Contact Us](#)

- [Logout](#)

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Contact Us

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